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ABSTRACT

This document contains 11 papers from a 2-day meeting on the principles, practice, and effectiveness of Jobrotation, which denotes a European Union program of investing in human capital by giving employees the opportunity to temporarily leave their posts for training without any major disturbance in the production process. The following papers are included: "Foreword: Jobrotation--Employment/Training Rotation--Good Practice in the European Union"; "'Jobrotation' in France: A Pioneering Measure" (Patrick Guilloux); "Jobrotation Development and Dissemination in Europe" (Jens Kruhoffer); "German Experience of Jobrotation: A Case Study" (Monika Kammeier); "Danish Experience of Jobrotation: A Case Study" (Ghita Vejlebo); "Jobrotation Efficiency: Small and Large Companies Compared" (Lizzi Feiler); "Contribution of Mr. Athanasios Papathanasiou, Director of the Technopolis Vocational Training Centre"; "Jobrotation from the Perspective of Enterprises, Employees and Political Decision-Makers--Expectations and Results Illustrated by the Example of 'Jobrotation for the Bremen

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Region'" (Hubertus Schick); "A Few Danish Comments on the Concept of Jobrotation" (Jorgen Mork); "Jobrotation as a Means of Promoting Innovation and Employment. A Model for Small and Medium-Sized Enterprises in North Rhine-Westphalia (D)" (Reiner Siebert); and "Synthesis of the Work" (Andre Kirchberger). One paper contains a substantial bibliography. (MN)

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PANORAMA

Agora VIII
Jobrotation

Thessaloniki, 20 - 21 March 2000

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Agora VIII
Jobrotation

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Cedefop Panorama series; 33

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Foreword

Jobrotation – employment/training rotation – good practice in the European Union

The term '*Jobrotation*' denotes a scheme, a technique and a sophisticated instrument for investing in human capital. As its name implies, *Jobrotation* permits rotation between employment and training. The main idea is to provide an employee with the opportunity of temporarily leaving his post for training without causing any major disturbance in the production process. It also implies that an employee who leaves for training is replaced by someone from outside so that the number of staff in the enterprise remains the same and they are sufficiently skilled to be immediately operational.

What differentiates *Jobrotation* from other possible forms of replacement, such as using temps or subcontracting, is the investment made, at the instigation of the public authorities, in unemployed people. However, as unemployed people can scarcely be expected to be immediately operational, *Jobrotation* involves training them beforehand. Ideally this training takes place both in a training centre and in the enterprise where the replacement will receive the necessary instruction from the person he is going to replace. Thus the latter acts as a tutor. So the rotation between employment and training corresponds to the following parallel segments:

Period	**0**	**1**	**2**	**3**	**4**
Active without employment	unemployment	training in training centre	training in enterprise as trainee	employment in enterprise as replacement	...
Active with employment	employment in enterprise	employment in enterprise	employment in enterprise and tutoring	training in training centre	employment in enterprise

Once a replacement has been trained, he will then be able to replace other employees who have to leave to go on training. This makes the investment made in the initial training profitable. European experience shows that one replacement replaces on average 4.5 workers.

However, the term 'rotation' does not adequately describe the process. There is, it is true, rotation; but the rotation does not consist of going around in a circle; it consists instead of an upward spiral towards comprehensive retraining of the workforce in an enterprise and in the labour market in general.

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The special feature of *Jobrotation* is that it acts as an interface between the labour market inside an enterprise and the outside labour market.

The basic idea of *Jobrotation* is this very simple in principle and very sophisticated in application. Moreover, it is not a new idea. The principle of *Jobrotation* is to be found in one of the measures adopted by the *Front Populaire* in 1936[*].

However, it was not until the 1990s that the principle produced a measure that was actually applied in any significant way. This was first in Denmark from where it spread to the rest of Europe, thanks in large part to the efforts of the *EU JobRotation* network that now comprises 38 partners in 14 European countries.

Jobrotation has undoubtedly been a success, to the point where it is universally acknowledged as an example of good policy practice in the field of employment/training in Europe.

However, is the concept of good practice itself ambiguous? What in fact is good practice? It is undoubtedly a method, a technique, a way of doing something that is has been effective at a given time in a given place, and which it is hoped can be adapted and applied at other times and in other places. However, the success of a practice is not due solely to the technical aspects of the methodologies implemented. The success or failure of an employment/training policy is also due to the cultural environment, social relations, the stage of development of the factors of production, the economic climate and the relative strengths of the social partners.

An attempt to spread a good practice in Europe could fail miserably owing to the cultural, political, social and economic differences that characterise the various countries of Europe, let alone the various regions of Europe. Moreover, to seek to promote, at any cost, practices considered good in a given European configuration – for example Scandinavian Europe, Germanic Europe, English speaking Europe – in another configuration – for example Latin Europe, Mediterranean Europe, and central Europe, smacks of paternalism and condescension. It is undoubtedly true that lessons can be drawn from the experiences of others and this is where the diversity of Europe constitutes a rich resource. But it is quite another matter to start teaching lessons. That shows an ethnocentric blindness that leads straight to failure.

However, *Jobrotation* seems to be well and truly taking root just about everywhere in Europe. In fact it seems to correspond perfectly to the paradigm of good practice so lauded by the European Commission. And *Jobrotation* has actually proven to be extremely adaptable and flexible. It has the chameleon's ability to assume the colour of its environment.

Jobrotation is, first and foremost, a measure which serves the interests – albeit conflicting – of all the social partners:

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[*] Translator's note: The *Front Populaire* was a coalition of left-wing parties that came to power in France in 1936 and introduced a number of major social reforms.

(a) it is in the interests of enterprises because it increases productivity and makes enterprises more adaptable to technological and organisational changes by promoting investment in human capital;

(b) it is in the interests of the workforce:

  (i) workers see it as a means of maintaining and improving their qualifications, safeguarding their jobs and winning promotion;

  (ii) for the unemployed it is an opportunity to become requalified by obtaining new qualifications or refreshing old ones; it allows them to occupy a post temporarily, to obtain a foothold in an enterprise and to obtain recent professional experience (in 75 % of cases, according to *EU JobRotation* statistics, they end up in a post in the enterprise in which they acted as replacements);

(c) it is in the interests of the public authorities: the State, public administrations and policy-markers see it as a tool for social and vocational integration policy; *Jobrotation* is the way to transform a passive employment-policy instrument – unemployment pay – into an active instrument, where the same sums subsidise the salaries of replacements or of employees on training, rather than indemnifying members of the workforce without jobs.

Jobrotation is also – as we have already suggested – a measure that can be used both for the low-skilled and for the highly-skilled because the employment aspect of the measure is always accompanied by a training aspect. The latter normally involves a preparatory stage in the new post in the enterprise.

Jobrotation is particularly suitable for small enterprises, which would not be able to send staff for training if there was no replacement. It also suits large enterprises which keep abreast of human resource management and for which *Jobrotation* is an excellent way of organising communication between their internal labour market and the outside market.

At the crossroads between employment policy, training policy, and social policy, *Jobrotation* is justifiably and legitimately successful. However, no measure is without risks or disadvantages. There is no universal panacea. And *Jobrotation*, which has proved to be so effective during job crises, seems to run out of steam a little during periods of recovery.

Agora 8's ambition is to take stock of the spread of *Jobrotation* in the European Union. An Agora traditionally takes place over three half-days. During the three half-days of this Agora, which takes place in the spring of the year 2000, we want to:

(a) review the implementation of *Jobrotation* in Europe;

(b) analyse *Jobrotation* as a 'good practice';

(c) consider the future of *Jobrotation*.

Agenda of the meeting

Monday 20 March 2000

09.00 Welcome and opening of the Agora: Johan van Rens, Director, Cedefop

09.15 An historical perspective by Patrick Guilloux, Technological Institute (IUT) of the University of Rennes (France)

Session I The implementation of *Jobrotation* in Europe

9.30 *Jobrotation* development and dissemination in Europe, Jens Kruhøffer, Secretariat of *EU JobRotation*

9.50 Study cases:

- Presentation of a case by the manager of a small enterprise (10 employees), Ms. Monika Kammeier, SKS Die Druckvorstufe GmbH (Germany)
- Presentation of a case by the consultant of a Union trade, Ms Ghita Vejlebo, Arbejdernesoplysningsforbund (AOF), former consultant of the Kvindeligt Arbejderforbund i Danmark – KAD (Denmark)
- Presentation of a case by substitute, Mr Andreas Meyer, substitute in a telecommunication enterprise in Bremen (Germany)

11.20 General discussion on the diversity and on the qualities of the *Jobrotation* practices

12.20 First on the spot conclusions, by André Kirchberger former Unit Director at the European Commission (France)

Session II *Jobrotation* as a good practice

14.30 Social partners' round-table discussion on *Jobrotation* as a good practice
Introduction to the round table discussion by Éric Fries Guggenheim (Cedefop)

- Mr Nikolaus Bley, DGB-Bildungswerk Nordrhein-Westfalen e.V (Germany)
- Mr Didier Gelibert, The French National Association for Motor Training – ANFA (France)
- Mr Bo Edlung, Association of Swedish Engineering Industries (Sweden)

15.45 General discussion on *Jobrotation* as a good practice

16.45 *Jobrotation* efficiency compared in big and in small enterprises, Ms Lizzi Feiler, Ösb-Unternehmensberatung, Wien (Austria)

17.05 Is *Jobrotation* equally adapted for qualified and for unqualified workers?, Ms Emmanouela Stefani, Technopolis of Thessaloniki (Greece)

17.25 *Jobrotation* as seen by the enterprise, the employees and the policy makers – Expectations and achievements as seen from the example of '*Jobrotation* in the Bremen region', Mr Hubertus Schick, Universität Bremen (Germany)

17.45 Debate on the contributions/interventions

Tuesday 21 March 2000

Session III The future of *Jobrotation*

09.00 Social partners' round-table discussion
Debate actualisation: the criticisms addressed to *Jobrotation*
Introduction to the round table discussion by Jørgen Mørk – AOF of Greve (Denmark)

- Mrs Sointu Toivonen, Hotelli- ja Ravintolahenkilökunnan Liitto HRHL – SAK (Finland)
- Mr Evaristo Guerra de Oliveira, União Geral de Trabalhadores – UGTP (Portugal)
- Mr Liodaki Kyriaki, Chamber of small and medium sized industries of Thessaloniki (Greece)

10.00 General discussion on '*Jobrotation* criticisms'

11.00 The challenges of *Jobrotation* in the beginning of 21st century, Mr. Reiner Siebert, BFZ Essen – in agreement with Ministerium für Arbeit, Soziales und Stadtentwicklung, Kultur und Sport des Landes Nordrhein-Westfalen (Germany)

11.30 General discussion on 'The future of *Jobrotation*'

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1. '*Jobrotation*' in France: a pioneering measure

Patrick Guilloux (1)

In the past decade there have been notable developments in '*Jobrotation*' in various northern European countries, especially Denmark. This has not been the case, however, in France, one of the countries making least use of this 'sophisticated instrument' (2), despite the raft of measures adopted by the State over some fifteen years.

Nevertheless, France seems to have been the first country – a few months before the outbreak of the Second World War – to introduce a measure that in many ways, both in its objectives and design, appears similar to those introduced in Europe over recent years.

The measure was established by a decree of 6 May 1939 (3) codifying the legislation on unemployment that had been passed since 1934-35, in a context that it is of interest to recall briefly.

The French economy, in common with the economies of every other western country, was in the grip of an unprecedented crisis, with employment suffering greatly. Unemployment tripled from 1930 to 1939 (4) in a country that had long faced a shortage of manpower (5); indeed, it would face the same problem after the Second World War, right up to the second half of the 1960s.

Paradoxically, this high rate of unemployment went hand-in-hand with a shortage of skilled workers, especially in industries working for national defence; France was in the midst of a rearmament process, to which it devoted substantial resources (6).

It was in response to the combined challenges of unemployment and the shortage of skilled manpower in this type of industry that the authorities gradually came to the decision in 1939 to devise an ingenious measure (see 1.2 below). At least in part it was based on legislation passed in the previous years, which even at that time placed vocational training at the heart of the campaign against unemployment (see 1.1 below).

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(1) Lecturer at the Université de Bretagne-Sud – IUT, Vannes

(2) Fries Guggenheim, Éric. Introductory note to Agora VIII, *Jobrotation – Rotation emploi-formation.*

(3) *Journal officiel*, 7 May 1939, p. 5795 *et seq.*

(4) See Hesse, Philippe Jean; Le Crom, Jean Pierre. *L'indemnisation des chômeurs dans les années 30*. In *Les sans-emploi et la loi*, pp. 43-68, Éditions Calligrammes, 1988

(5) 1900 to 1930 was a period of considerable expansion in France's industrial production against a background of labour shortages, to a great extent due to the war. This was the reason for the massive recourse to immigration (with an annual rise of 10 % in the foreign population from 1911 to 1926). See M.T. Join-Lambert et al. *Les politiques sociales*, 2nd edition. Paris: DALLOZ-FNSP, 1997, p. 36.

(6) Asselain, Jean Charles. *Histoire économique du XXème siècle: tome 1: la montée de l'État (1914-1939).* Paris: DALLOZ-FNSP, 1995, pp. 134-135.

1.1. Using training to combat unemployment (1934-1938)

At the time France had no tradition of State intervention in this field, but rising unemployment in the 1930s finally forced the authorities to act. In an effort to curb its spread, they were to implement a policy of major public works in the fields of transport, infrastructure and housing for this purpose, as had been done in the past.

Although up to that time (7) training had been deployed mainly for 'the rehabilitation of disabled ex-servicemen' (8) and the groups that later came to be treated on a par with them (9), the authorities were also for the first time to use training to combat unemployment, allocating specific appropriations to the vocational training centres for the jobless set up from 1934 on by employers' associations to help unemployed people aged under 20.

To facilitate the 'retraining of the unemployed' (*rééducation professionnelle des chômeurs*), the government of the day adopted two decrees (10) on 30 October 1935 with the aim of 'invigorating and coordinating the efforts undertaken in order to help certain unemployed persons to learn a new trade that will provide them with adequate resources' (11).

This legislation provided for the payment of subsidies to 'vocational training centres for the unemployed' (12) approved by the Ministry of Employment (13) in consultation with a joint ministerial committee for industrial decentralisation (14). These training centres could be run by:

(a) industrial employers in their own establishments;

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(7) Lietard, B. *La formation professionnelle continue en France entre les deux guerres mondiales*. In *Éducation Permanente: Regards sur l'histoire de la formation des adultes*, 1982, No 62-63, pp. 115-126.

(8) Law of 2 January 1918. *Journal officiel*, 3 January 1918; See Montes J. F. *la formation professionnelle des adultes invalides après la première guerre mondiale*, Formation-Emploi, No 35, pp. 14-21.

(9) War widows (Decree of 21 May 1919); civilian war victims (Law of 21 July 1921); victims of industrial accidents (Law of 5 May 1924), etc. See Montes J. F., *ibid*., pp. 17-18.

(10) A Decree-Law and simple Decree, *Journal officiel*, 31 October 1935.

(11) Extracts from the report to the President of the Republic.

(12) Arts. 1 and 2 of the Decree-Law.

(13) Art. 2 of the simple Decree.

(14) *Ibid*., art. 8. This decree was amended by a Decree of 14 October 1936 on membership of the (interministerial) committee for industrial decentralisation (art. 8), enlarged in particular by the Secretary of *Confédération général du travail* or his delegate, and by a decree of 4 June 1937 replacing this committee by an 'vocational retraining committee' consisting of a representative of the general confederation of employers and of the CGT from the two sides of industry, as well as an employer and worker member of the *Conseil supérieur du travail*.

(b) public authorities (*départements*, communes, public establishments, unemployment funds);

(c) technical training institutions;

(d) employers' or workers' associations;

(e) associations whose objects were retraining.

One of the conditions to be satisfied in order to qualify for accreditation was 'to indicate the occupations for which the training for the unemployed is to be given'. In spite of high unemployment, there was still a considerable shortage of labour in certain occupations and trades, especially in industrial concerns working for national defence.

Over the course of the years, the authorities concentrated their efforts on the vocational retraining centres working towards this end and providing training for a workforce that was no longer to be just 'specialist' but 'skilled' ([15]). For instance, a Decree-Law of 14 June 1938 ([16]) authorised 'the Minister for National Defence and War, the Minister for the National Navy and the Minister for Aviation. . . to subsidise, out of the appropriations earmarked for armaments expenditure, those vocational retraining centres . . . giving evidence that they have supplied skilled labour to factories working for national defence'.

This thinking is even more explicit in a Decree-Law of 12 November 1938 'on the vocational retraining of the unemployed and worker advancement' ([17]), adopted in implementation of the Law of 5 October 1938 'giving the Government the powers to bring about an immediate revival in the country's economic and financial position'.

A report to the President of the Republic preceding that legislation states that while these 'bodies can be used to instruct the unemployed . . . in a new trade in which there is a shortage of manpower', they have '. . . also and above all . . . the mission of securing for our industry and more specifically for the industry working for national defence those specialists whom it needs' ([18]).

This legislation, linking the objective of rearmament and vocational retraining, is also important on another count: for the first time in France it introduced the idea of 'further training' (*perfectionnement professionnel*), laying the foundations for the diversification of the functions of vocational training and, as a result, its target groups.

([15]) The distinction is clearly made by article 1, para. 4, of the Decree-Law of 12 November 1938 (see below): 'vocational retraining will have the main aim of providing factories working for national defence, and in particular for aviation, with the semi-skilled or skilled manpower they require for their proper operation'.

([16]) *Journal officiel* of 15 June 1938, p. 301, art. 1.

([17]) *Journal officiel* of 13 November 1938, p. 12870.

([18]) Para. 2 (see also paras. 3 and 5). Provision is made to increase the credits for this purpose so that new centres can be set up (para. 5).

It stressed that, 'due to the inadequate numbers of skilled manpower to meet the needs of national defence industries, it is vital to plan for the training of skilled workers through appropriate vocational education to be imparted to those workers who appear best suited to receive it'. It calls this vocational improvement operation that it wishes to encourage and develop '*promotion ouvrière*' – worker advancement. The same concept is to be found after the war in an edict of 1948 establishing 'improvement courses leading to worker advancement' ([19]), which was soon to be superseded by the concept of '*promotion du travail*' and '*promotion supérieure du travail*' ([20]) – 'advancement of work' and 'further advancement of work'.

The 'advancement' thus offered to 'workers' in employment was an essential condition for the implementation of a system of '*Jobrotation*' in which the absence of an employee for the purpose of training is paired with the employment of an unemployed person, an arrangement which was to be introduced the following year by the decree of 6 May 1939.

1.2. A new measure to combat unemployment: the replacement of 'workers' in training by unemployed persons (Decree of 6 May 1939)

Out of a concern 'to step up the redeployment of the unemployed', this decree, which also covers unemployment benefit and unemployment insurance schemes as well as the employment and placement of the unemployed, devotes a specific chapter to various 'special measures for worker advancement institutions and centres for the vocational retraining of the unemployed' ([21]).

We shall consider here only those associated with the development of worker advancement institutions. 'Set up by an industrial establishment which has already rationally organised apprenticeship or by a centre for the vocational retraining of the unemployed', these institutions must 'have as their aim to provide for the progressive training of the workers required for production' ([22]).

The decree of 6 May 1939 for the first time defined the conditions for government accreditation. To obtain such approval and therefore enjoy public subsidies, they had to furnish a set of particulars in support of their application, in particular on the 'occupations to be taught' and the 'programmes of worker advancement to be implemented' ([23]). In the case

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([19]) Edict of 15 April 1948 (*Journal officiel* of 16 April 1948, p. 3763).

([20]) See in particular Law No 59-960 of 31 July 1959 on social advancement. Regarding this question, see Terrot, Noël. *Histoire de l'éducation des adultes: la part de l'éducation des adultes dans la formation des travailleurs: 1789-1971*. Paris: Edilig, 1983, pp. 190-195.

([21]) Title V, art. 129 to 157.

([22]) Art. 131.

([23]) Art. 130.

of those set up by an industrial establishment, moreover, they 'must operate during the establishment's normal working hours ([24]) and be installed on premises clearly separate from the production workshops' ([25]) – a provision that is still in force in France in the field of continuing vocational training.

But the chief merit of this decree was to create the conditions for the development of '*Jobrotation*' practices, as they would be called today. It offered financial incentives for enterprises to promote such practices. These related both to training leave for an employee and to the recruitment of an unemployed person to take his place, who would where possible have received prior training in a centre for the vocational retraining of the unemployed (although the decree does not make this compulsory).

The factors taken into account for the purpose of payment of subsidies by the State to worker advancement institutions ([26]) included the payment to the enterprises concerned of an 'allowance equivalent to one half of the wages paid to workers admitted to courses at worker advancement institutions' ([27]). This meant that the State entered into a commitment to compensate one half of the cost of continuing to remunerate an employee while on training.

The authorities also undertook to pay bonuses to employers 'taking on unemployed persons to replace workers allowed to take worker advancement courses' ([28]), a strong incentive not to leave an employee's job unfilled while he was on training leave.

It should be pointed out that industrial establishments setting up worker advancement institutions were not, unlike establishments not having such facilities, required to replace workers permitted to take a course – who themselves continued to earn no less than the rate laid down by collective agreement for their skill over the whole period of their training – with unemployed persons introduced, as a priority, by public placement agencies ([29]). These bonuses were paid so long as the workers being replaced by the unemployed persons were allowed to attend the worker advancement institution course ([30]).

This is a brief description of *Jobrotation* as established in France until just before the Second World War. Its creation, completed by the Decree of 1939, was in fact staggered over almost five years, from the establishment in 1935 of a specific training tool – the centres for the

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([24]) Unless otherwise specified by the Minister for Labour, after consultation with the vocational retraining committee.

([25]) Art. 132. If this is not possible, the provision made must enable inspectors easily to ensure that workers accepted for the course are not taking part in production work.

([26]) Cost of fitting out or renting workshops or classrooms, the purchase of machine tools, tooling or motors, depreciation of premises, motors and machines and other tooling, instructors and monitors, the purchase of raw materials and fuel, etc.

([27]) Art. 133 5°.

([28]) Report to the President of the Republic, para. 25; art. 136.

([29]) Art. 132, para. 3.

([30]) Art. 139.

vocational retraining of the unemployed – to the diversification of their functions in 1938 through 'worker advancement', thus creating the conditions for the emergence of '*Jobrotation*' practices, strongly encouraged by the authorities in 1939.

This pioneering measure, more of an incentive than an obligation, emerged in a context of intensive rearmament, although it was never in fact really applied. The events triggered in the autumn of 1939 with the declaration of war initially disrupted greatly the adult vocational training system that had gradually been established since 1935 and then, following the armistice of June 1940, to lead to its disappearance (31), nipping in the bud any trials of *Jobrotation* mechanisms which the legislation reviewed might have permitted.

It was to be almost half a century before the authorities rediscovered the value of *Jobrotation*. The measures – and they are still in force – that they later adopted were to be influenced by different concerns.

Some measures were designed to promote access to training by employees by offsetting or relieving part of the cost to the employer of their replacement. (It is accepted that absence for training is often poorly received and on occasion hampered, in particular in small and medium-sized enterprises, because of the disruptions it might entail.) This is the purpose of one provision of Law No 84-130 of 24 January 1984 reforming vocational training (32), which authorised individual training leave management agencies to refund employers with a workforce of under 50 for their payment of a temporary employment allowance to persons recruited under a fixed-term contract to replace an employee absent on personal training leave (*congé individuel de formation*) (33). Law No 91-1 of 3 January 1991, one of whose aims was to increase employment through training in the workplace (34), provided for government payment of a flat-rate grant to employers with a workforce of less than 50. This compensated them for wages paid to workers recruited by them or made available to them by temporary employment enterprises or groups of employers, to replace an employee who is absent for training under the plan or personal training leave (35).

The same Law included a provision (36) that goes back to the technique of pairing the employee on training leave with the jobseeker recruited to replace him, as initiated by the Decree of 6 May 1939. This law extended the scope of '*stages d'accès à l'emploi*' (job access placements), now known as '*stages d'accès à l'entreprise*' (enterprise access placements), administered by the public-sector employment agency, ANPE (37).Their primary aim is to give jobseekers the occupational skills with which they can obtain a job whose vacancy has been notified to ANPE. They may also enable employees to acquire further training to broaden their skills or to offer the opportunity of acquiring a higher qualification while at the same time offering access to recruitment to a jobseeker, whether or not the beneficiary of a workplace placement opportunity, to replace the employee if he is promoted on completion of training (38).

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(31) Bayard A. *La formation professionnelle dans les esprits et dans la loi*. Paris: Assocation Nationale pour la Formation Professionnelle des Adultes, 1970. p. 71 *et seq*.

(32) *Journal officiel*, 25 January 1984, p. 683 *et seq*.

(33) Art. L. 950-2-2 of the Labour Code. The rate of this allowance is 6 % of the earnings received by the employee during his fixed-term contract.

(34) *Journal officiel*, 8 January 1991, p. 231 *et seq*.

(35) Art. L. 942-1 of the Labour Code. This conditional aid (see Arts. R 942-1 to R. 942-8) amounts to FRF 3 000 a month (EUR 458) for 169 hours' training (FRF 17.75 an hour, or EUR 2.70).

(36) Art. 1 (Art. L. 322-4-1 of the Labour Code).

The first two measures cited in fact leave the employer completely free to arrange to replace the employee as it thinks fit: by direct recruitment, or by using the services of a temporary employment enterprise or of a group of employers. This is not, strictly speaking, *Jobrotation*. This is not the case which the third measure, covering permanent job integration, which is a genuine system under the auspices of the public-sector employment agency.

France, then, does not lack legal instruments in the field of *Jobrotation*. Even so, *Jobrotation* is still very little used (39), doubtless a sign of the existence of obstacles to its development that are more cultural and social than economic or technical.

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(37) *Agence Nationale Pour l'Emploi.*

(38) ANPE, *Classeur Références, 14 April 1999. Centre Inffo, Fiches Pratiques 2000*, pp. 446-449. The State contributes all or part of the funding of the employee's training and, where appropriate, of the jobseeker who is to replace him under an agreement concluded with the beneficiary employer. If the employee in training continues to be paid by his employer, ANPE also pays a flat-rate contribution of FRF 28 per hour's training (EUR 4.27).

(39) Leaving aside the very few employers that have embarked on substantial programmes in this field on their own initiative, only two occupational sectors are seriously involved. One is the automobile repair and sales sector (the reader is referred to the paper by D. Gelibert of ANFA at the same Agora). The other is the plastics processing industry, with its major programme known as 'Action for the development of competences'. which aims simultaneously to upgrade the skills of those working for enterprises in the sector and to train their replacements. set up more than eight years ago (for enquiries for information, contact PLASTIFAF, 6 rue du Jardin, 75850 Paris Cedex 17, tel. +33-1-47660047).

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2. *Jobrotation* development and dissemination in Europe

Jens Kruhøffer

A short introduction

Only a few years ago, even for experienced labour market organisations and authorities, the word '*Jobrotation*' was totally unknown, or was understood as something else.

Today *Jobrotation* is well known in the field of labour market policy in all the EU member states, and is mentioned in half of the member states' national action plans of employment and ESF guidelines or actions.

Jobrotation has been put on the political agenda.

Why is it so?

Is the concept of *Jobrotation* so radically new and innovative in itself?

And if not, has it some hidden benefits or spin-off effects which justify the emphasis, although no overall in-depth cost-benefit analysis has been done so far?

Or, is it an example of heavy marketing which succeeded very well in a situation where the Commission and the Member States are looking for innovative labour market tools within the common European employment strategy which is monitored by the Commission every year?

This article will argue that all three points of view have some relevance. The most important factors, though, could be defined as:

(a) *Jobrotation* tackles more problems at the same time, initiates dialogue, and cross policy actions, claims that all parts will be winners by running *Jobrotation*;

(b) it is a very flexible tool and adaptable to the local/regional labour market situation;

(c) the employment impacts of *Jobrotation* are very high compared to other employment tools.

Before further elaboration on these essential points, we will try to give a short overview of the development of *Jobrotation* and its current situation.

2.1. *Jobrotation* origin and development in quantity.

2.1.1. Origin and development in Denmark.

Jobrotation was introduced in Denmark in 1989 and with the legislation for educational leave in 1993 it became an integrated part of the Danish labour market legislation, 'active labour market policy'.

The economic background to the introduction of *Jobrotation* was the existence of a high and stable unemployment rate and increasing need for new skills following the introduction of new technology and new sorts of work organisation.

The first projects, though, were carried out by trade unions, shop stewards and educational organisations connected to the labour movement, who strongly underlined the need for further training for blue collar workers; these had, historically, been given a very low priority in terms of company training resources. New legislation in 1989 (Adult Education Grants) elaborated, together with public support for work placements, the financial background for the first projects.

Employer interest in upskilling employees (without excessive cost) to suit a rapidly changing market meets the interest of the employee representatives in achieving a better working and social life in a desire to increase further education and training.

What made *Jobrotation* break through was its match with labour market policy. The unemployed were offered a 'real job' opportunity for a while with a very good chance (in Denmark app. 75 %) to enter regular employment after the end of the scheme.

The actual low unemployment rate in Denmark has (partly) changed the motive for companies to use *Jobrotation*. In many projects, the element of recruitment policy is as strong a motivation for *Jobrotation* scheme as the element of further training for employees. The needs of skilled labour force have led to reevaluation of the benefits to be achieved by *Jobrotation*: 'We still appreciate the further training of employees …in ICT skills and communication…. However, what we value most….is the local cooperation…to find and train well motivated newcomers for the company' (40).

The number of *Jobrotation* participants in Denmark from 1996 to 1999 has been as follows:

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(40) Materials and conclusions of the *Jobrotation* conference at the Danish Parliament, 14 February 2000

Table 1: Number of Jobrotation participants in Denmark for 1996-1999 ([41])

1996	1997	1998	1999
36 431	19 080	26 538	24 457

The relationship between employees and substitutes has been approximately 4:1, meaning that a substitute on average takes over five different jobs (normally in the same company), substituting for a longer term which, according to different surveys, ([42]) is very important for employment potential.

At its peak in 1996, *Jobrotation* had 36 000 participants, which is approximately 1.25 % of the labour force.

From 1996 to 1999 more than 150 000 Danes participated in *Jobrotation*, out of which approximately 30 000 have been substitutes. This suggests that 22 500 unemployed Danes got a job through *Jobrotation*, is a little more than 0.75 % of the total Danish labour force of 2 900 000 persons. This is playing with the figures to a degree, since no figures indicate whether the unemployed would have found jobs anyway and whether the jobs offered after the scheme would have been filled.

What type of companies and economic sectors use *Jobrotation*? We lack information on this. What we know is that the numbers of companies participating have decreased and – at a glance – do not look too high:

Table 2: Number of companies taking part in Jobrotation.

Number of companies taking part in *Jobrotation*:	**1996**	**1997**	**1998**	**1999**
in private sector	429	238	194	160
in public sector	223	209	157	246

There are no national statistics on the sectoral relationship or the type or size of company participating in *Jobrotation*. What the statistics indicate is that we are talking about medium sized and larger companies, which on average generates 100 employees in private companies following further training courses([43]).

([41]) Labour market statistics from the Danish Labour Market Authority (AMS)

([42]) Survey carried out by Danish Technological Institute: DTI, *Jobrotation- et middel til udvikling af virksomheder, beskæftigede og ledige? Erhvervsanalyser, marts 1999.*

([43]) Statistics from the Danish Labour Market Authorities (AMS) are subject to certain uncertainty due to the registering of companies in network projects and in public companies

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2.1.2. Origin and development of *Jobrotation* in EU member states.

The situation in the middle of the nineties in the EU member states was not very much different from the situation in Denmark:

(a) a high and stable unemployment rate (11 %);

(b) an increasing need to speed up the re-qualification of both employees and the unemployed;

(c) a labour market changing so rapidly in terms of new technology and globalisation, that the European Commission in 1995 stated that in 2005 80 % of all technology would be new, at the same time that 80 % of all education would be old, forming a skills gap and a serious threat to the competitiveness of European companies;

(d) a two-speed labour market, where companies with traditional technology and large groups of unskilled workers are precluded from development of sectors with modern technologies;

(e) sector isolation: a lack of cooperation and dialogue between different policies and organisations seeking more holistic approaches to the problems.

The *EU JobRotation* network was very clear that the basic economic situation was very much in favour of the introduction of such labour market tools as *Jobrotation*. The concept is very simple and claims to solve many problems simultaneously. However, there was no legal framework to build on to establish a financial background to experiment and develop *Jobrotation* in the Member States.

Eventually, considerable subsidies from EU funds, especially the Community initiative Adapt, brought *Jobrotation* to almost all the Member States. From 1996 –to 1999 approximately 14 million Euro were invested by the Commission and the member states to support *Jobrotation* projects for 20-25 partners.

At the same time, the political environment in the EU was changing radically. The Amsterdam treaty and the Luxembourg meeting put the labour market and employment policy onto the common agenda with the four pillars and the guidelines as concrete mainstreaming tools, and the NAPs to follow and monitor the process (*Jobrotation* as one of the10 selected projects). The Member States were to do continuing self-evaluation and be evaluated in their efforts by the Commission.

A *Jobrotation* conference in Copenhagen in November 97, arranged by the Commission and the Danish Ministry of labour, concluded that the process could cover at least three of the four pillars: adaptability, employability and equal opportunities.

There has been increased EU Member State interest in, and attention to, *Jobrotation* as a way of dealing with some of the main labour market problems. The British Minister of State for Employment, Andrew Smith, highlighted *Jobrotation* as an area of innovation and good practice within the tourism/hospitality sector, particularly the way it is combined with New Deal:

'Like so many good ideas, the principle behind *Jobrotation* looks startlingly simple. Employees receive specialised training, which brings badly-needed skills and ideas into the organisation. To 'cover' their jobs – often a problem for small and medium sized employers – young, unemployed people on the New Deal programme are brought in. This gives them valuable work experience and, in practice, often leads to permanent jobs with the host organisation. When it works well, *Jobrotation* is even better than a 'win-win' situation. It is a 'win-win-win' triangle, with the employer, the employee and the unemployed person all standing to benefit'.

Walter Riester, German Federal Minister for Labour and Social Affairs, stated during a congress of international experts:

'Those of us who viewed this project (Adapt) exhibition found numerous thought-provoking aspects, one of the many excellent examples being the *Jobrotation* concept. ... The German government sees *Jobrotation* as a very promising new instrument for labour market and employment policy and has therefore taken initial steps towards anchoring it permanently in the Social Code'.

However, it should be stressed that although the simplicity of the concept and the positive political environment seem to give a common platform for *Jobrotation*, no two *Jobrotation* projects have been identical or even similar see the following chapter).

Consideration of how to initiate and run a *Jobrotation* project has always started from scratch. The running of the project has been dependent on EU funding, but the majority of the work has been the elaboration of a local or regional platform to make it happen. Seen from this point of view, one of the most important achievements of the *EU JobRotation* network has been to facilitate the training of project managers. (44)

The project manager is a key role, since no infrastructure exists to facilitate projects demanding the planning and analysis needed in a *Jobrotation* project. To work simultaneously on competence development within the company and training for work placement for the unemployed requires a 'big round table' to get all relevant partners together. In addition, it requires a change in attitudes to regulations and routines from all partners. As an example, employment centres have to allow the company to play a more significant role in the process of visitation, training and the substitutes. Companies need to develop a positive attitude to the long-term unemployed and secure them positive integration at the workplace, for example by using mentors.

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(44) *EU Jobrotation* Secretariat, Project Management in *Jobrotation*. Summary Report. Transnational Module on Training of Project Managers, 1998

Employees need some guarantee that their jobs will not taken over by the substitutes, and trade unions have to be convinced that *Jobrotation* is not just another word for cheap labour. Educational planning and qualification analyses should ensure that the further education offered fit into the business strategy of the company. This very often requires that vocational training providers to be willing and able to adapt and tailor their courses to the qualifications needed. In some Member States training matters depend very much on the social partners; in other member states the social partners are involved.

At the end of the day, the project manager, having completed all troubleshooting, must carry out careful evaluation not only to secure the quality of the next project, but also to indicate how political and organisational changes could facilitate future projects, including other ways of financing the schemes. Then the project manager is on the way to become a programme manager.

2.1.3. *Jobrotation* by number in the EU

The number of *Jobrotation* projects and participants in other member states is still not large compared to Danish numbers. *Jobrotation* exists in all the partner states but Denmark is still an experiment, though in some states in a final stage, and far from being mainstreamed, talking about significance in economic, legal, labour market and training terms. There is no fixed relationship between the numbers of *Jobrotation* projects and political interest. In Portugal the number of *Jobrotation* projects is relatively high, yet the first *Jobrotation* legislation was only approved in February 1999 ([45]).

Table 3: Jobrotation in Europe 1996-99 ([46])

Country	Number of companies	Number of employees	Number of substitutes
Austria	66	2677	302
Belgium	22	42	27
Denmark	1802	80287	16957
Finland	23	400	150
France	38	476	166
Germany	740	2032	968
Greece	10	10	30
Ireland	1	40	12

([45]) Ministry Of Labour And Solidarity, Portaria [Administrative Rule] No 328/99 of May, 12; Minister of Labour And Solidarity, Decree-Law No 51/99 of 20 February

([46]) The statistics cover only *Jobrotation* projects implemented by EU-*JobRotation* partners (with exception of Denmark), i.e. it does not cover all *Jobrotation* experiences in the member states. We do not have access to all the statistical information concerning *Jobrotation* schemes developed in Sweden, Germany, England and France, where there are some *Jobrotation* schemes developed by non-members of the network.

Country	Number of companies	Number of employees	Number of substitutes
Italy	18	58	80
Netherlands	60	600	300
Portugal	214	648	396
Sweden	46	1032	286
UK	85	537	208
TOTAL:	**3125**	**88839**	**19882**

(a) the number of companies in table 3 indicates that *Jobrotation* is a factor is in very small companies compared to Denmark. In fact *Jobrotation* has been introduced in very small companies in a majority of the EU member states, especially Germany, Portugal, Scotland, England, Italy (Sicily), Finland and Greece, while *Jobrotation* has been practised in larger companies mainly in Denmark, Austria and France; exceptions are seen in most Member States;

(b) variation is seen in the relationship between the numbers of substitutes and the numbers of employees;

(c) a survey of *Jobrotation* in Germany (47) taking 22 *Jobrotation* organisers and 26 projects into consideration, emphasises the variation between *Jobrotation* in Denmark and in Germany:

  (i) The average number of employees per company participating in *Jobrotation* in Germany is 2.8 (740 companies in 1997-99) compared to the Danish average, 100 (592 private and 612 public companies in 1996-99). The explanation is basically that the companies using *Jobrotation* in Germany are much smaller. According to the survey, approximately 45 % of companies have fewer than 50 employees;

  (ii) the percentage of employed skilled workers in *Jobrotation* in Germany is much higher than Denmark. (Germany 77 %, Denmark 50%), while the figure for unskilled workers is the opposite (Germany 8%, Denmark 40%) (48);

  (iii) management taking part in *Jobrotation* comprises 14 % of the total numbers of workers on release in Germany. No numbers are known for Denmark, and the definition for 'managers' is not clear enough to draw any clear conclusions;

  (iv) further training in Germany is much more individually orientated (89%) than in Denmark, where group courses are most common;

  (v) in Germany, the majority of the substitutes are paid only the same amount as their unemployment benefit or social welfare. In Denmark, all substitutes receive ordinary wages, except for a small group of substitutes in the public sector. The jobs could be subsidised from the labour market offices, but in 1998, only 17 % of the substitute jobs were subsidised. Subsidies were particularly used in the private sector (83%);

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(47) *Jobrotation in Deutschland. Eine bundesweite Auswertung, Januar* 2000

(48) *DTI, Jobrotation- et middel til udvikling af virksomheder, beskæftigede og ledige?, Erhvervsanalyser, marts 1999*

(vi) in Germany, *Jobrotation* projects are financed by a mix of funding, including regional and national labour market programmes and ESF funding, while in Denmark *Jobrotation* is financed by (a combination of) strictly national and regional labour market funding;

(vii) in Germany the costs of project management is almost 24 % of the total budget for *Jobrotation* projects, which is partly an investment in building up the necessary know-how and experiences, but is seen mainly as an investment in piloting, testing, implementing, and mainstreaming *Jobrotation*, particularly for SMEs.

The comparison between Germany and Denmark shows that there are many differences in the overall *Jobrotation* approach, particularly with regard to SMEs. In Denmark in particular, medium sized companies use *Jobrotation* for group-based personnel development courses and as recruitment policy. In Germany, very small companies are supported, allowing individuals to achieve needed competencies and new skills.

Two additional comments should be made:

(a) the developments in Germany now offer Denmark the chance to study *Jobrotation* in micro companies. Though Denmark invented the *Jobrotation* model, it could benefit from the German laboratory;

(b) *Jobrotation* is just a tool, allowing priority to be given to other campaigns such as SME competence development, battling bottleneck problems, lifelong learning and the inclusive labour market.

We will now offer an overview of *Jobrotation* models in EU Member States.

2.2. Models of *Jobrotation*

The variations on *Jobrotation* are unlimited in respect of company type or size, type of further education and training, target groups for substituting, etc..

In the EU *JobRrotation* network, the development of *Jobrotation* in the different regions has been more practically than theoretically funded:

(a) the partner organisation has been committed to plan and start up a *Jobrotation* project, normally based on (significant) Adapt funding;

(b) a local partnership has been developed or has been committed;

(c) local or national co-financing has been considered;

(d) different types of companies or sectors have been discussed;

(e) though there has been no transnational overall master plan of where *Jobrotation* should be presented and tested, knowledge and experience from the transnational partnership have supported local partners finding and keeping focus and securing quality in project management.

The complexity means that the partner organisation has an essential role. The demand of this role tends increase along with of implementation needs.

The partner organisation is expected (by the EU *JobRotation* network) and committed to work for the implementation of *Jobrotation* in the legal framework of the ESF guidelines and regional labour market practice and strategies. The partner organisation has to adapt to a role of 'programme-managing' and 'information unit' just as much as the former role of 'project managing'. In addition, the role of co-ordinator of different types of network seems to be increasing in importance as *Jobrotation* is more accepted.

The partner organisation very often analyses the needs for and provides further training. It has significant transnational experience, often based in a transnational or trans-European department. Following success in trying out *Jobrotation* projects, the partners in many cases decide to set up a *Jobrotation* department in their own organisation. Other examples show that it is a hard work to implement *Jobrotation* in the organisation itself, if *Jobrotation* is too complicated, or if the results seem to be visible only in a longer perspective. Relying on committed individuals in organisations is a short-term strategy, though it is the reality for the long first phase of setting up the transnational and regional networks.

This background is necessary to understand why the development of *Jobrotation* in Europe has not simply pursued general needs such as lifelong learning and access to real jobs in the labour market for the unemployed.

It has also been strongly connected to the existence of strong partners which are able to set-up dialogue and cooperation between local and national partners from different policy and administrative fields: the social partners, labour market authorities, business development organisations, educational and training organisations, and research institutions. (49)

Variations in the *Jobrotation* models can be illustrated by examples.

In southern England *Jobrotation* was introduced in the tourism and hospitality sector as a response to the bad image of the fastest growing sector in Great Britain (expected 8 % in 2000). The image problems were based on low skilled and low paid jobs, and further training and new qualifications are recognised as the most important way to deal with the problems. Though successfully tested in some companies (small hotels) the real break-through for *Jobrotation* in southern England came by an alliance with the 'new deal' programme. Now

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(49) This feature was strongly emphasised by the Danish Minister of Labour, Ove Hygum in his presentation during the *Jobrotation* conference at the Danish Parliament 14th of February 2000.

Jobrotation is spread from region to region via the set-up of a cell-structure where local steering committees are supported by the partner organisation, Milton Keynes College.

In France much work has been done to investigate and prepare the implementation of *Jobrotation* across a complete sector, namely the automobile repair trade. The initiator has been ANFA, which is a sectoral organisation, working on administration of educational funds, as well as the provision of training within the sector. The profile of the sector is dominated by very small enterprises, which have, on the one hand an increasing demand for the implementation of new (technology) skills, and, on the other hand, specific problems when it comes to releasing their employees temporarily for training.

Side by side with this sectoral approach, another strategy of development of *Jobrotation* has been explored in France by E2I[50] in Lille. *Jobrotation* is planned and implemented in various regions, e.g. at the present in Corsica, through selection and training of new project managers who build up local partnerships.

In Germany *Jobrotation* was extremely high in 1998-1999. More than 35 projects were started across the *Länder*. A majority of the projects targeted micro companies with less than 50 employees. In Berlin, *Jobrotation* was set up in handicrafts companies to try to solve the problems of companies disappearing when the old owner retired (generation shift). An association of *Jobrotation* organisations and promoters was formed in 1998 and has worked hard to improve the legal framework for *Jobrotation*.

In many regions, *Jobrotation* was used to introduce or reintegrate disadvantaged groups to the labour market. In Ireland a test project in the Aer Rianta airport trained female returners to go in as substitutes. In Scotland, *Jobrotation* is used in Ayre to battle social exclusion in the local labour market. In Copenhagen, 24 % of the substitutes in 1998 were immigrants, and in southern England up to 70% of the substitutes in certain areas are ex-offenders. In Portugal, *Jobrotation* began as a motivation to support migrants returning to Portugal in gaining access to the labour market, and in Sicily a certain priority has been given to female unemployed in becoming substitutes. It is important that, in all cases, the companies' needs for qualifying their own employees was the starting point of the process. The principle of the 'pull-effect', that the unemployed are asked to become trained and substitute employees in a real job, is the background for an impressing employment rate of 70-75 % on average.

In almost all *Jobrotation* projects there has been an element of examination and adjustment of existing offers for training and further education, which is an immanent consequence of the 'rotation'. Examples of this are:

(a) individual or small group oriented courses when no courses exist to match the agreed time away from the workplace;

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(50) Cf. Henri Le Marois and others. L'expérimentation française de la méthode *Jobrotation* pilotée par E2i, (Objectifs, démarche, résultats) - Lille, 25 January 2000
Espace Inter Initiatives - 2, rue Ducourouble 59000 Lille - Tél. 03 20 78 20 37 - Fax 03 20 57 97 71

(b) tailor-made courses, in time or content, for groups from the same company or a network of companies. Customer focus increases when a company, as part of a project, makes the necessary comparative analysis of current and future qualifications;

(c) training which compensates for a lack of general or core skills, which is often a barrier to participation in further training and lifelong learning. This is emphasised when blue collar workers are more likely to be offered further training and education by *Jobrotation*, as in Denmark from1989 onward;

(d) further training as a combination of on- and off-site training;

(e) in Denmark, *Jobrotation* indirectly contributed to or influenced reform of vocational schools and labour market centres by having a strong focus on the customers needs.

(f) In Sicily, Finland and southern England, later also in Lower Saxony in Germany and in Portugal, *Jobrotation* in the tourist and hospitality sector integrated transnational activities into the project. It facilitated study-visits for hotel owners and project workers, developed common training modules, and provided training and work practice for the foreign employees participating in the projects. This indicates two types of transnational *Jobrotation*:

  (i) double-loop *Jobrotation*, where foreign substitution allows employees to become substitutes in a company in another state, which allows the employees there to do the same;

  (ii) cross-border *Jobrotation*, where two neighbouring regions train the unemployed from one of the regions to become substitutes in companies in the other region, while their employees are offered further education and training. Two examples are anticipated soon, namely between Copenhagen and Malmö (retailing sector) and between Vest-Vlandern and Northern France (textile industry). In both cases, the motive has been sectoral need for a qualified labour force and differences in the level of unemployment between the regions and the sectors.

These examples show the high flexibility of the *Jobrotation* tool and the most varied contexts in which *Jobrotation* is improved. It also points out that *Jobrotation* is not an objective in itself, but is a tool to facilitate other objectives: increased further training, real job allowance for disadvantaged groups, etc..

2.3. Future and perspectives.

2.3.1. Main strengths and weaknesses.

The main strengths and weaknesses of *Jobrotation* are the same. *Jobrotation* deals with (at least) three policy areas and main sectors at the same time: Business development, employment strategies and lifelong learning.

In this sense *Jobrotation* is a catalyst to innovation or a support for new 'holistic' strategies in the labour market such as:

(a) local and regional networks including all type of partners;

(b) company recruitment policies: close cooperation with labour market organisations, mentors to integrate substitutes and newcomers;

(c) HRM strategies: qualifications profiles, educational planning and tailor-made training;

(d) joint campaigns (the inclusive labour market, lifelong learning, regional pacts of employment, etc.).

At the same time, this is also what makes the simple concept very complicated.

The questions of who is paying for *Jobrotation*, and how to evaluate its success need to be addressed. If the labour market authorities are paying, a tendency of labour market policy would be to evaluate only the employment rate achieved by the projects. Increasing competitiveness would be a secondary goal, and innovations in local labour market organisations could even be a threat to the employment centres, because they would challenge routines and daily practice.

If companies are paying for employees and/or partly for substitutes, they would want a major influence not only on the content of the training schemes, but also on the recruitment of substitutes. This has already caused significant problems in relation to the employment centres.

This could lead to a stepmother paradox that the benefits to the single sector (business development, employment and training) is too low compared with the time spendings and requirements in changes of standards and therefore no one wants to take care of the 'child'.

Though changes in the legal framework are needed to facilitate *Jobrotation*, this in itself is not enough. The involvment of key players - employers organisations, associations and chambers, education and training institutions, ministries and labour administration - is vital to the mainstreaming of *Jobrotation*. This has happened here and there on a local, regional and sectoral level, but an overall involvement is still lacking.

2.3.2. Joint campaigns.

Jobrotation should not be seen as isolated from tendencies in the European labour market. It can be linked to general situations or tendencies of today.

Two-speed labour market and the skills gap.

The main objective for *Jobrotation* is to facilitate the upskilling of the European labour force. By insisting on 'rotation' in the labour market, *Jobrotation* indicates the possibility of making the unemployed needed in the workplace. However, *Jobrotation* should not be reduced to employment policy; the 'locomotive' of the process is the need for new competences and upskilling in companies.

The inclusive labour market

Inclusion of the long-term unemployed and other disadvantaged groups in a rapidly developing labour market is inhibited by barriers such as attitudes and increased skills requirement. There are no easy options but *Jobrotation* is one of the labour market tools which insists on a real job perspective for the target groups. It requires agreement on the quality of substitution, achieved by careful network planning, adequate and tailor-made pre-training and mentor schemes. In addition, 'domino-schemes', where *Jobrotation* is combined with internal rotation at the workplace, tends to ensure that the substitutes fit the job function.

Territorial and regional development approaches

Jobrotation is used as part of regional or local development strategies, as seen in Holland (Braband) and Scotland. It has proved a very flexible tool, adjustable to all sort of conditions. In the future it is expected that *Jobrotation* will be tested in large scale tests, e.g. in Sicily for the coming two years in all economic sectors and in the automobile repair trade in France. Results will show us the potential of *Jobrotation.*

Facilitate the increase of job satisfaction and the developing work

According to a survey by Time Manager International, a huge majority (approximately 80 %) of employees in European companies do not care about the market situation of the company they are working in. They do not think the performance of the company is their responsibility and only one in five is proud of their place of work. There are many possible explanations for this. The sense of responsibility of employees is very often strongly connected to the level of influence they have on their own work situation, to the potential to develop the content of daily work and develop as individuals.This has been an essential point for trade unions in Scandinavia for some time (51), eclipsing old roles of fight for wages and working hours.

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(51) Danish Confederation of Trade Unions (LO) has, together with counterpart organisations in five other Member States carried out an extremely interesting Adapt project from 1997 to 2000, with the 'developing workplace' in almost 200 companies.

3. German experience of *Jobrotation*: a case study

Monika Kammeier (52)

3.1. The company

sks... is a prepress company that has been in business for around 20 years. It employs some 20 skilled workers, including three trainees. **sks**... has acquired an established position in the market in Bielefeld/Eastern Westphalia by consistently and continuously evolving from a typesetting company into a full media service provider.

3.2. The company's business objective

We offer our customers a full range of prepress services, from general promotional planning through design and production to printing. The other services we offer are electronic editing and processing of illustrations and images, photographic databases, a film-making and proofing service, and, since 1996, multimedia production.

This means that we design, produce and supply, in accordance with our customers' requirements, printed products such as catalogues, brochures, posters, advertisements and calendars, and non-printed products such as catalogues on CD-ROM or web pages.

3.3. The market

In addition to printers, publishers, small advertising agencies and graphic designers, the majority of our customers are small and medium-sized industrial, commercial and production enterprises in the region. As a service provider, we regard our physical proximity to our customers as critically important despite digital communications. Only short paths and personal contact with customers allow the provision of flexible, individualised service and advice to customers.

However, the ensuing partnership-based, and in some cases reciprocal, business relationships demand a high level of competence in service and advice provision. This must be seen against a background in which technical and staffing innovations, in line with market trends, are an essential component of continuing customer relationships.

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(52) **sks...** die Druckvorstufe GmbH

3.4. Technological developments

When Sks Layoutsatz GmbH was founded, in January 1981, its field of activity was traditional typesetting. In other words, the sole task of typesetters was to record, construct and print out, on film or paper, texts and tables in accordance with customers' required standards and using professional typesetting equipment. Employees taken on and trained by us became trained compositors.

The spread of PCs in the early 1990s led to a dramatic, continuing technological revolution. In some areas, our former customers became our competitors. Since then, they have been recording their own texts and simply giving us data to structure, process and manage. Digital processing tools have replaced many former jobs and tasks in the printing sector, such as manual work, assembly and copying.

The newly developed technology and complex software programs led to structural change in the printing sector. The traditional boundaries between advertising agency, lithographic printing house, typesetters and printers, with clearly defined fields of work, became blurred. In order to survive, prepress enterprises were obliged to develop into media services enterprises offering printing and multimedia services. The intensified rivalry in a newly evolving market triggered a general drop in prices, leading to competition that was ruinous in some cases.

3.5. The demands on companies and employees

As a result, however, companies lacked the financial scope, first, to make the necessary investments in technology and second, to offer employees extensive continuing training or retraining. The wide variety of different operating systems and software programs coming into being meant that employees' tasks were making completely new demands on them.

For smaller companies in particular, financing the necessary skills training represented a burden that came close to threatening their very existence: as well as continuing to pay high collectively agreed wages, they also had to fund additional loss of production and substantial training costs.

The alternative was to make job cuts, with large compensation payments for longstanding employees, as jobs involving manual activities became redundant. This was no way to ensure that a company had promising future prospects.

From the point of view of business economics, companies were in a catch-22 situation.

No skilled workers were as yet available. New career profiles were only just being developed. Yet in order to fulfil the new contemporary requirements, and hence to make jobs safe in the long term, employees with years of experience in traditional tasks (compositors) had to be completely retrained within the space of a few years to cope with the new technology of

Apple-Macintosh and PCs. The large number of company closures and bankruptcies of typesetting, lithographic and repro enterprises shows how many companies failed in this aim.

When we asked the employment office in the early 1990s if we, or our staff, could obtain support for the necessary adjustment process, we were simply told that retraining measures, some of them lasting several months, were financed only for the unemployed.

However, there was no possibility of help for people still in employment – 'the employees concerned would first have to become unemployed…'. Afterwards it would then be possible to take back the former employees, now skilled workers.

The results of this approach were apparent in the labour market. Unproductive employees in their 50s and sometimes younger, whose training was no longer up to date, were made redundant and received large compensation payments; younger workers who had grown up with the new technology were taken on at much lower wages or 'bought in' in the market. Companies that had first offered employees training found themselves facing substantial wage demands. As far as employers were concerned, these demands clearly exceeded their pain threshold, so newly created and costly know-how left the company. Meanwhile, despite retraining programmes, older long-term unemployed people had only moderate success in finding jobs.

This antisocial practice was implemented by larger companies, which were able to afford the compensation payments. Smaller enterprises, which more often demonstrate personal commitment to their employees, but which had no room to manoeuvre in financial terms, went to the wall – and their workers lost their jobs.

As a result:

(a) inflexible older employees who lacked the relevant know-how were dismissed;

(b) unemployment rose, while at the same time there was a shortage of skilled workers;

(c) the public purse was involved in considerable expenditure on unemployment benefit, maintenance allowances and wholly funded measures to integrate the over-50s, the success of which was questionable;

(d) small and medium-sized enterprises suffered bankruptcies and business shutdowns.

3.6. Skills training measures

3.6.1. Objective

Even before this period, we had always tried to give our employees long-term job security. In addition to the company's strategic orientation, our amply documented advanced training programmes were also important in this context. Given the circumstances described, however, we had very few options in terms of the attention we were able to devote to our objective. Continuing training was primarily given to those employees who demonstrated a high level of commitment, flexibility and willingness to learn. It was only possible to transmit absolutely essential knowledge to all other workers. This means that the value of the working capacity of those who missed the boat was reduced.

We welcomed the possibilities of support inherent in the *Jobrotation* project. We considered it to be a highly practicable measure for our sector – though long overdue, as it came too late for many companies and their workers. Once our attention had been drawn to the *Jobrotation* project, we saw it as an initial impetus for raising the level of our employees' skills.

All employees were to achieve the level of knowledge inherent in the new job profile of *Mediengestalter* [media designer]. Employees with a greater capacity to learn were to be trained in the field of multimedia production.

3.6.2. Implementation

We planned to implement the project in 3 stages.

Stage 1: **'DTP media designer training for former compositors'**

Aim: Skills in a wide range of text- and image-processing software to ensure more flexible deployment and a more equal distribution of work, in contrast with the previous highly specific training

Participants: 3 production workers, one trained as a photosetter and two trained as compositors

Scope of training: 19 days of seminars in the training institution plus practical work in the company

over a period of: 7 weeks

Replacements: 2 unemployed people

for periods of: 6 and 4 weeks

Stage 2: **'Skills training in Internet and multimedia production'**

Aim: Acquisition of comprehensive basic knowledge as regards Internet production. Acquisition of customer advice skills

Participants: 3 production workers trained as photosetter, compositor, electronic image processing (EIP) operator
3 employees working in decision-making positions/as customer advisers, trained as graphic designer, compositor, lithographer

Scope of training: 64 days of seminars in the training institution plus practical work in the company

over a period of: 11 weeks

Replacement: 1 unemployed person

for a period of: 12 weeks

Stage 3: **'Skills training in Internet and multimedia production'**

Aim: Acquisition of interface skills in company departments
Integration and adaptation of existing customer data in line with the new media
Acquisition of customer advice skills

Participants: 3 production workers trained as photosetter, compositor, EIP operator
4 employees working in decision-making positions/as customer advisers, trained as 2 graphic designers, compositor, lithographer

Scope of training: 16 days of seminars in the training institution plus practical work in the company

over a period of: 7 weeks

Replacement: 1 unemployed person

for a period of: 8 weeks

Our employees took turns in attending seminars in the training institution, with their visits being dovetailed, i.e. one employee at a time spent 2-3 days a week attending courses. In between the individual courses, the skills acquired were consolidated in-house.

We identified and specifically defined the training required in our company. The initial offers made by the training providers quickly made it clear that we needed a training programme tailored to meet our own particular needs. This made it possible for every individual employee to be trained in accordance with his/her existing level of training and potential, and for the necessary know-how to be imparted in the shortest possible time. None of our workers felt over- or underextended. This meant that loss of production was kept to a minimum. Standard seminars would not have achieved this level of efficiency and effectiveness for our employees and for us as employers. Consequently, the more expensive individual training provision has more than paid for itself.

3.6.3. Financing

Our employees continued to be paid their full wages/salaries during the training programme. External training costs were subsidised by the '*Jobrotation*' support programme, with a 60 % subsidy for stage 1 and a 50 % subsidy for stages 2 and 3.

Temporary replacements were employed under the heading of a training programme for the unemployed in accordance with § 48 *Sozialgesetzbuch* (Social Security Code – SGB III), with a subsidy from the employment office:

'Improving the prospects of integration into employment as DTP media designer' (word processing, processing of tables, layout, integration of text and illustrations, drafting of graphics and logos, working with multiple files with the aid of standard software programs, photographic work, multimedia production).

We were able to pay the temporary replacements DM 300.00 a month in recognition of their work – if we had paid them more than this, their unemployment benefit would have been reduced by the same amount.

According to the programme's specifications, the subsistence costs of an individual unemployed person may be assumed only for a maximum of eight weeks. In stage 2, one replacement worker spent 12 weeks in our company, but for the last two weeks she received no benefit payments from the employment office. Nevertheless, she completed her training in our company at her own expense, since she realised how important it was for her to acquire the relevant practical skills.

3.6.4. Success

Having completed three *Jobrotation* programmes in 1999, we wish to offer our sincere thanks to the district crafts guild, which acted as coordinator, for the exemplary way in which it handled the cooperation, without unnecessary red tape.

We also wish to stress that the experience completely lived up to our expectations, and that, in our view, the *Jobrotation* programme fulfils its purpose.

The financial and staffing assistance provided enabled us to offer almost all our employees future-oriented advanced training on a scale that would not have been possible without the *Jobrotation* programme.

It is obvious that the skills training campaign has helped bring about a substantial improvement in the working atmosphere, with employees being considerably more motivated thanks to their improved self-esteem. The up-to-date training they have now received ensures that their capacity for work will retain its value in the coming years and therefore makes their jobs secure.

A total of four temporary replacement workers spent periods of four-twelve weeks in our company in order to acquire practical skills. Before coming to us, they had all attended a retraining programme. However, what employers are looking for in the labour market is 'qualified' people with practical experience. As a result, once those who have been retrained complete a programme of practical in-company training their chances of obtaining a job increase considerably.

We know that one woman who had previously been unemployed was able to take up a permanent position appropriate to her skills immediately after completing the programme. Our own company offered a permanent job to the replacement worker who had demonstrated her very high motivation during stage 2.

We as a company have clear evidence of a positive trend in productivity, thanks to qualitative and quantitative improvements. Improved utilisation of the workforce as a whole also has a positive effect on the delegation of tasks in-house. Our high level of commitment is explicitly recognised by our workers and, in conjunction with the improved image, this helps to ensure that the employee turnover rate is kept to a minimum. Consequently, the well-trained worker potential remains within the company as a critically important production factor.

We also needed staff with the appropriate skills for new tasks in the field of Internet and multimedia production, which is increasingly replacing the previous range of services. Without additional external support, our company would not have been able to afford the expensive continuing training or actual retraining required for new multimedia occupations, in addition to the necessary technical investments.

The subsidised continuing training programmes enabled us to make it possible for some traditionally trained employees (graphic designer/compositor/EIP operator) to move into new media/multimedia. This future-oriented sector is known to be some 100 000 skilled workers short at present, since the relevant workers were not trained in time. However, we, as a prepress company and media services provider, are now in a position to meet customers' demands and thus ensure the future survival both of the company and of existing jobs within the company.

One criticism we would make is that we only happened upon the *Jobrotation* project by chance. No training provider or employment office drew our attention to this way of obtaining subsidies. Quite the reverse, in fact, as we had to begin by giving the relevant employment office some of the appropriate information. Only after we had drawn the attention of the department responsible for coordination to the possibility did the news come of further *Jobrotation* programmes in enterprises in the printing sector in our region. The commitment came too late for many small enterprises and their former workers.

3.7. Summary

I see the current *Jobrotation* model as an ideal preventive measure for preserving jobs in enterprises affected by structural change and, at the same time, reintegrating hard-to-place unemployed people into the labour market.

However, I believe subsidies of the kind represented by the additional financial support in the programme should not become the norm.

Nevertheless, as long as employers are shouldering the skills training risk on their own, I regard the *Jobrotation* model as a meaningful skills training campaign for the following reasons:

(a) prevention – ensuring that there continue to be jobs for older workers too; we should not neglect the psychological effect of still feeling of value when over 50;

(b) a greater likelihood of integration for job seekers as a result of the additional practical experience acquired as temporary replacements;

(c) a positive economic effect on training institutions as a result of increased demand;

(d) ensuring the continued survival of small and medium-sized enterprises by making them innovative and competitive.

In my opinion, collective bargaining policies should take account of the need for lifelong learning. Therefore, skills training measures should be made a compulsory element of performance. Otherwise the company owner who finances regular advanced training for his employees will continue to bear a dual burden, when his employee also seeks a substantial wage increase owing to his improved skills. Rival enterprises that do not have the same corporate culture can simply buy in know-how by offering appropriate wages.

If this does not happen, we will continue to suffer negative phenomena such as rising unemployment, retraining measures that are wholly financed by state authorities and a shortage of workers in the new occupational fields.

It is conceivable that *Jobrotation* could help to bring about labour market developments geared to the future, in the following scenarios and situations:

(a) sectors in crisis;

(b) major technological advances such as the introduction of EDP-based processes, or mechanical engineering, with the changeover to CNC/CAD systems;

(c) winding up of obsolete industries and production systems, accompanied by the emergence of new sectors (switch from coal to solar energy, or evolution of the printing sector into new media).

In such cases, thanks to a positive trend in the labour market, *Jobrotation* can help to ensure a return on investment for all parties.

We very much hope that this process will continue.

4. Danish experience of *Jobrotation*: a case study

Ghita Vejlebo ([53])

The paper is intended to pass on experience acquired from a case study and give rise to some general comments in connection with *Jobrotation* as a labour-market policy and training policy tool.

The case study will describe a programme for employees at the company of Maersk Medical Business Unit Infusion Devices (MM-BUID) in Osted/DK and for substitutes from the County of Roskilde Public Employment Service. This programme, which ran from October 1997 to March 2000, comprises two rotation programmes. The first programme began in February 1998 and consisted of eight courses, each lasting one week. The second rotation programme extended from September 1999 to the end of the programme in February 2000. The *Jobrotation* programmes formed part of ATTAK project 98/AT/2279: Medstyr 2. The following played a major role in the design and monitoring of the programmes:

(a) the management of MM-BUID;

(b) the elected shop stewards at MM-BUID;

(c) the Union of Female Workers (KAD) in Roskilde;

(d) the Public Employment Service (AF) in Roskilde;

(e) AOF Greve Project and Development Department.

The programmes are financed by the regional labour-market council (RAR) for the County of Roskilde, by MM-BUID, through ATTAK funds and via government refund schemes. A detailed examination of the project economics follows below. However, the background to the programme should first be outlined.

4.1. Background

There have been various training initiatives at Maersk Medical over the last ten years. The shop steward and management have undertaken many different activities in close cooperation. The shop steward became interested in training and *Jobrotation* after attending a short course held by the local branch of the Union of Female Workers (KAD).

The Union of Female Workers has organised a number of guidance and training activities since the end of the 1980s. These activities, the main purpose of which was to motivate members for training and work, were initially directed towards unemployed members and then

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also towards those in employment. The pivotal point for the various motivation activities was a training adviser in each county. This intensive and high-priority effort produced many positive results, reflected in increased numbers of unskilled women in training and/or employment. To quote specific figures, the KAD in the County of Roskilde in 1999, for example, accounted for around 70 % of rotation funds applied for from the regional labour-market council.

The KAD has contributed both unconventional and creative guidance programmes, training programmes and various information meetings for the unemployed.

MM-BUID, where both rotation programmes discussed in this paper took place, forms part of the MM Group, which mainly produces single-use disposable articles made of plastic; in the case of MM-BUID, infusion sets for the insulin consumption of diabetics. The wage costs of this production are high. Transferring production to other countries with substantially lower levels of pay is, therefore, a realistic future scenario for the company. The ATTAK project Medstyr 2 and the rotation programmes linked to it led to the view that jobs of this type can be kept in Danish hands only if a break is made with conventional work organisation according to Taylorian principles and an effort is made to move towards the creation of flexible production, with well-trained and motivated staff.

A development of this kind was started at MM-BUID in 1991 when co-determination groups were introduced in the company. The production staff were brought together in groups based around specific functions and/or types of product and were given responsibility for the employment of colleagues, some quality checks, and a smaller proportion of the production planning. These initiatives had initially formed the background to economic growth and increased staff satisfaction within the company – a development which MM-BUID itself referred to as vitalisation of the company. Because of internal and external circumstances, the positive trend in relation to staff satisfaction could not be maintained. The parties behind the project therefore agreed to implement a programme aimed at revitalising co-determination. The aim of the first rotation programme was exploratory, ascertaining the views and wishes of all staff on work and cooperation at MM-BUID. The second *Jobrotation* programme offered something more specific – expanding real co-determination for production staff at the company. The conditions for *Jobrotation* programmes in the County of Roskilde are described below, followed by the distribution of work between the parties in the project. Special circumstances in the two *Jobrotation* programmes are then emphasised, and finally the utility of *Jobrotation* programmes will be discussed.

4.2. Conditions for *Jobrotation* in the County of Roskilde

Before we go on to describe the case, there are a number of conditions underlying *Jobrotation* in the County of Roskilde which must be described – these relate to approval procedures and approval criteria, the elements in calculation of project economics, and distribution of work between the parties in a rotation programme.

4.2.1. Approval procedure and criteria

Unlike many other counties, where *Jobrotation* programmes can be approved by officials in the council secretariat, it has been decided on the Roskilde Council Labour Market Council (RAR) that *Jobrotation* programmes are to be approved politically (54). Approval or rejection take place against the background of a *Jobrotation* application (see below) which is drawn up by the parties behind the rotation programme and brought up for discussion at one of the RAR's monthly meetings.

Prior to the Council's opinion, what has happened in the rotation programmes considered in this paper has been that the company and the training institution have drawn up a firm proposal for objectives and programmes for the *Jobrotation* projects. After a presentation in the context of a rotation steering group, where the outline was discussed, the training institution drew up a *Jobrotation* application. The application was sent in draft form to the parties on the rotation steering group. In this way it was possible to submit suggestions for amendments or corrections. Only when all the parties to the project could vouch for the programme was the application submitted to the RAR.

It is evident that the parties in the rotation steering group do not produce rotation applications without some form of guidelines. Some of these guidelines, which may have a more or less official character and are more or less flexible, must be mentioned here:

(a) the rotation programme has broad backing in the company – i.e. the management and shop stewards support the programme;

(b) the training part of the *Jobrotation* programme satisfies objectives which strengthen the qualifications of the participants (unemployed or in employment) as employees in the region – i.e. a real upskilling can be made probable;

(c) the programme gives groups particularly hit by unemployment an opportunity for temporary employment (unemployed in reactivation period (minimum 1½ years of unemployment), unemployed persons with an ethnic background other than Danish and unemployed persons over 45 years of age);

(d) the opportunities of the unemployed to find subsequent employment (either by virtue of relevant occupational experience from a rotation workplace or through employment at the rotation workplace) are strengthened;

(e) there is a reasonable distribution between job training and regular employment;

(f) there is a reasonable relationship between public financing and co-financing by employers.

As will be apparent from the attached rotation application, these guidelines have been taken into account in various ways.

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(54) For the composition of the RAR, see: www.af.dk/Region/Roskilde/information/kontoroplysninger/arbejdsmarkedsraad.htm [cited 30.01.2002]

The last item – finance – is often of decisive significance and therefore merits further consideration.

4.2.2. Finance

Rotation programmes draw on various funds: state, regional and employer-paid cofinancing (55). These funds together are to finance:

(a) training programmes (i.e. payment of training institution);

(b) full pay to unemployed persons who substitute for permanent employees who are on courses (56).

This paper is not intended to present a detailed account of the options for public subsidies for continuing training – merely to point to the training leave ordinance and VUS (adult education support) which is state-financed, as well as training reimbursement for the unemployed, job training allowance and purchase of training for the unemployed and permanent employees, which are financed regionally.

To assist with understanding of how a rotation programme is structured, a financial overview of the key figures for the second rotation programme of the case study is presented:

Example of setup of project finance (rotation application attached)

A.1 Purchase of training for employees	
16 course weeks x DKK 33 500	DKK 536 000
A.2 Public support	
Training leave:	
100 persons x 2 course weeks x DKK 2 760	DKK 552 000
VUS:	
30 persons x 2 course weeks x DKK 2760	DKK 165 600
30 persons x 2 course weeks x DKK 825	*(DKK 49 500)*
A.3 Total employees attending courses	
536 000 (purchase of training for employees) less DKK 717 600 (refunds)	**DKK -181 600**

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(55) In the programmes with which this paper is concerned, indirect EU financing was received for project planning and coordination via ATTAK funds.

(56) As can be seen from the budget estimate, wage expenditure on permanent employees does not appear as a separate item in the *Jobrotation* accounts. The budget presupposes that the company – with the assistance of the substitutes – is able to maintain production, and therefore obtain full value for pay expenditure on the permanent employees (who would also be there without a *Jobrotation* programme being held).

NB: VUS subsidy for training is used to pay for course programme for permanent employees (A.1)

B.1 Purchases of training for the unemployed	
2 course weeks x 31 500 (AOF Greve P&D)	DKK 63 000
2 course weeks x 43 360 (AMU Western Zealand)	DKK 86 720
B.2 Pay expenditure on substitutes	
18 substitutes x 21 weeks x 37 hours x DKK 154 (gross pay (1))	DKK 2 153 844
- **Job training subsidy**	
18 substitutes x 10 weeks x 37 hours x DKK 48.84 (job training subsidy)	DKK 325 274
- **Refunds for leave**	
18 substitutes x 8 weeks x DKK 2 760 (refunds for leave + training compensation)	DKK 397 440
B.3 Total unemployed who are to be substitutes	**DKK 1 431 130**
Company co-financing:	
Pay expenses for substitutes	DKK 2 153 844
less:	
Job training subsidy	DKK 325 274
Refund for leave for substitutes (4 weeks)	DKK 198 720
Refunds for permanent staff	DKK 717 600
Total	**DKK 912 250**

As is apparent from the estimate of project finance, there are various parameters to adjust the project finance. Attention is to be drawn here, in particular, to the job training period for the unemployed. During the job training period, the employer is paid a sum corresponding to DKK 48.84 per hour of work (1999 figure). It is thus possible to minimise co-financing by the company by prolonging the job training period and vice versa.

During the period of private job training, the unemployed person receives agreed pay but does not earn the right to daily allowances. Consequently the trade union has an interest in making the job training as short as possible while the company has the opposite interest. This difference in interest has not been dominant in the rotation programmes looked at here, as MM-BID was prepared beforehand to provide generous co-financing, but in other projects where the company does not have such large financial reserves or in the future when the financial incentive to start a rotation programme will be highly limited, the question of the distribution between subsidised work (job training) and regular work is, or will be, of key importance.

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(1) Gross hourly pay is calculated on the basis of an average calculation of the pay costs for the five shifts – here costs are particularly high for the weekend and night shifts

4.3. Cooperation between project parties

It has been shown to be essential for the success of a rotation project that the frameworks of the particular project are clear and the roles well defined. In the County of Roskilde, the regional labour market council, which is controlled by the partners, politically approves the individual project. A steering group is set up which constitutes the leadership of the project.

Many different models have been drawn up for a steering group for rotation projects, and much experience has been gained. This paper has been drawn up by the AOF Project and Development Department in cooperation with the KAD, and summarises many years of experience in this field.

4.3.1. Rotation projects and distribution of responsibility

Steering group

The steering group is to be regarded as the managing board of the project, representing the parties involved. The steering group defines the overall objectives and criteria for success of the rotation programme. The steering group is additionally concerned with matters such as target groups, working-life relationships, pedagogics, composition of the teaching, organisation of the project and choice of cooperating parties.

The steering group always consists of representatives of the company/companies, trade union(s), the public employment service and training institution(s). The steering group can choose to involve other parties. The basic assumption in this document is that the training institution leading the project is the main contractor.

Meetings of the steering group are held as and when required – generally at intervals of one to three months.

Tasks and responsibilities of the main contractor/AOF Greve P&D

The main contractor/AOF Greve Project and Development Department (P&D) attends to secretarial functions for the steering group and is responsible for the daily management of all phases of the project (preparation, execution and follow-up). P&D is, therefore, responsible for the objectives of the programme being pursued and – in cases of deviations/problems – for relevant information flowing in good time to the partners inside or outside the steering group (RAR, other providers of subsidies, employer representatives, etc., depending on the individual project).

P&D's tasks and responsibilities can be itemised as follows.

Function as secretariat:

(a) P&D calls meetings and proposes agendas for meetings of the steering group with at least three working days' notice. A project description, applications, plans and other important documents are sent out together with the agenda, unless otherwise agreed;

(b) P&D chairs the meetings;

(c) P&D keeps the minutes of steering group meetings and sends these out no later than two weeks after the meetings.

Preparation phase:

(a) P&D undertakes the necessary preliminary work so that it is possible to draw up a collective project description. This means agreements on content, target groups, finance, etc., with the parties involved, including any subcontractors;

(b) P&D draws up the overall project description and submits this to the steering group;

(c) P&D draws up the necessary and agreed applications for financial assistance (RAR, etc.) and submits these to the steering group;

(d) P&D draws up (preferably in graphic form) work, organisation, time and finance plans for the project;

(e) P&D draws up the necessary information material for the project's target groups and assists the Public Employment Service and the company/companies at information meetings;

(f) P&D arranges training programmes in accordance with the objects of the programme and on the basis of educational methods which satisfy the training needs of the target group(s).

Implementation phase:

(a) P&D assists the company/companies with administration in relation to obtaining refunds in the project;

(b) on the basis of the aims of the particular project, P&D is responsible for the quality of instruction and project management. This means, among other things, employing technically qualified project manager(s) and instructor(s) and coordinating with any subcontractors;

(c) a status report on the project, including evaluation, is continuously supplied to the steering group. During the prior training of substitutes, P&D draws up a status report to the steering group meetings, presenting an account of absences and dropouts among the substitutes;

(d) P&D ensures regular – agreed – contact between training and working life.

Follow-up phase:

(a) evaluation takes place throughout and at the end of the project – where appropriate in cooperation with an external evaluator. The evaluation takes place in relation to objectives and criteria for the success of the programme;

(b) the participants in the project have to have the option of continuously evaluating the content of the training;

(c) P&D submits proposals for follow-up and continuation of the project in relation to the workplace(s) involved. This is to be done in good time, so that continuous training and development work can be ensured to the benefit of both the employees and the workplace.

Tasks and responsibilities of trade union(s) in the steering group

These are as follows:

(a) the trade unions in the steering group as a minimum designate a contact from a union branch and a contact from the unemployment insurance fund for the individual projects;

(b) both contacts take part in rotation steering group meetings in the preparatory phase – and afterwards as necessary;

(c) the trade unions are responsible for a systematic and thorough search for potential substitutes among unemployed members;

(d) the trade unions attend information meetings for the unemployed and for permanent employees;

(e) the trade unions gather relevant information (hourly pay, supplements, hours of work, etc.) which is of significance to unemployed and permanently employed members;

(f) the trade unions are responsible for passing on information on possible consequences the programme might have for the members (new calculation of daily allowances, bonus schemes, night and evening supplements, etc.).

Tasks and responsibilities of the company/companies

These are as follows:

(a) the company/companies put(s) forward short-term and long-term objectives and criteria for the success of the programme in the steering group;

(b) the company/companies establish(es) qualification profile(s) for substitutes in cooperation with employees from the personnel group(s) the substitute group(s) is/are to form part of;

(c) the company/companies bring(s) in shop stewards and any other representatives of personnel groups who are directly affected by the programme;

(d) the company/companies ensure(s) relevant and timely information to all personnel groups and shop stewards who are directly or indirectly affected by the programme;

(e) the company/companies ensure(s) a firm basis among management so that the project is backed by the senior management of the company (where appropriate via cooperation committee – SU).

Tasks and responsibilities of the public employment service (AF)

These are as follows:

(a) AF assists the company in setting up a qualifications profile for substitutes;

(b) AF establishes cooperation with relevant unemployment insurance funds (municipalities, etc.) in searching for substitutes;

(c) AF calls information meetings and finances expenditure in connection with these meetings;

(d) AF announces the programme in relevant media;

(e) AF searches for substitutes – at start of programme and in the event of dropouts.

As can be seen from the above description of tasks and distribution of responsibility, it is the training institution which plays the key role in connection with the handling of *Jobrotation* projects, including the *Jobrotation* programmes under discussion here. However, the description of the role of the trade union is misleading if the overall lifecycle of the *Jobrotation* project from the very beginning of the lifecycle to its final conclusion is examined. The key role of the trade union is only played prior to the more formal initiatives in connection with the establishment of *Jobrotation* programmes.

4.3.2. Special role of the trade union

Before a steering group is appointed and an actual rotation project emerges, considerable motivation and confidence-building work has been done between the employer and employees. The trade union has played a major role in this work in this specific case.

The KAD has regarded *Jobrotation* as a way of killing two birds with one stone. The KAD could both have permanently employed members trained and create a link to the labour market for many unemployed members (or obtain new members if the recruitment of substitutes took place outside the KAD's membership).

The KAD appointed many local training consultants who, in the KAD's own words, informed and worked on the attitudes of the members and the management. There are several aspects to this work on attitudes, including:

(a) the informal meeting in the canteen, at which the training consultant talks about training opportunities over lunch;

(b) internal events such as training days or questionnaire surveys, interviews and end-of-day meetings, at which the needs of the members are raised;

(c) participation in the meetings of the cooperation committee (SU) at a company.

The typical situation is that the local shop steward proposes that the KAD's training consultant is invited to attend a meeting where continuing training is on the agenda – a proposal which normally meets with a positive response from the management. At the meeting, the training consultant can make use of his or her expertise to ask clarifying questions on the need for training, indicate possible training paths (including *Jobrotation*) and provide contact with a relevant training consultant.

When there is an agreement and an application, it is the task of the trade-union movement to create and nurture the necessary political networks to push projects through in the RAR (contact with other trade unions and the local-authority side and employer's side).

The trade-union branch also has to make a start on negotiating the members' conditions during the training programme, as there are both common denominators and differences of interest in relation to the goal of a training programme for the staff and management of the company.

At MM-BUID this led, prior to the second *Jobrotation* programme, to negotiations on whether the staff should receive bonus pay (part of the profit-related pay) while they were on courses. The KAD successfully negotiated bonus pay and various other benefits such as meals allowances, transport and extra payments for evenings and weekends. The trade-union movement should ensure that the management is aware of the wishes and requirements of the staff, and that these are not forgotten or overlooked. And, finally, it is naturally the task of the trade union to negotiate so that the members' needs are met.

As follow-up to a programme, the training consultant can additionally choose to contact the company with a view to establishing training agreements between the management and employed members. Training agreements open up the possibility of more long-term continuing training solutions, which may benefit both the staff and the company.

4.4. Establishment of the first *Jobrotation* programme

4.4.1. Why *Jobrotation*?

As already mentioned, the *Jobrotation* programmes which are the object of this case study were carried out as part of a larger ATTAK project. Although it was not necessarily the case beforehand that the training effort in the EU project would be carried out as a *Jobrotation* programme, there were three reasons in particular, from the point of view of the company, which make the solution obvious:

(a) MM-BUID could not allow the course programme to lead to a substantial decrease in production. In other words, the company needed to employ labour to fill the vacuum left by the production staff on courses;

(b) the company could obtain financial grants (financing of purchase of training and job training grants) by holding the continuing training programme as *Jobrotation*;

(c) the company was growing and therefore looked favourably on the possibility of being able to give permanent employment to the substitutes at the end of the rotation project. In this way the company could make sure of the possibility of taking on workers who had had part of their upgrading financed by grants.

The advantages of the other parts of the project were also evident. In addition to having the skills of existing and future members upgraded, the KAD had a common interest with the public employment service in giving some of the 'weak' groups of unemployed an opportunity to gain a foothold in the labour market. The public employment service had an additional interest in attaining the target figures for private job training while the AOF gained the holding of an extra training programme – training of the unemployed.

4.4.2. Objectives

There were fundamentally two objectives for the programme – one aimed at the company and another aimed at the unemployed.

In accordance with the ATTAK programme, the aim was to obtain a supply of staff for future work and cooperation at MM-BUID, to start up a process which would signify changed organisation of work with greater co-determination and new forms of co-determination. In accordance with the aims of the RAR, the programme was to ensure to the greatest possible extent that the substitutes were kept in the labour market.

4.4.3. Motivation

The *Jobrotation* programmes described here are predominantly targeted at people whose educational background only contains seven to nine years of schooling. In most cases, this target group does not wish to take part in continuing training. Some just want a job which does not demand too much thinking, while others are afraid that the substitutes will be better qualified, so that the company will prefer the substitutes to them, and finally many people feel that they are too old to learn anything new. But the main reason, in many cases, can be traced back to adverse experience from the time they were at school. To achieve the desired result from continuing training, it is important to tackle the resistance to the course programme beforehand, in other words to motivate people to take part in continuing training.

It is, in principle, a management task to motivate staff to take part in a programme which, in the judgement of the management, is in the best interests of the company. But the trade union and training institution can supplement the management in fulfilling this task to a great extent.

The trade union movement itself considers its task to consist in gently counteracting the resistance so that weak groups also become a part of the overall training plan.

In addition to information meetings for a large number of staff, at which representatives of the training institution and unemployment insurance fund present an account of the programme, AOF Greve Project and Development Department, in this and other programmes, has used work placement as part of the effort to motivate the staff. The teachers/consultants, who during the course programme have contact with participants, take part for one or two working days as production trainees. In addition to obtaining a deeper insight into the company culture, the teacher is given an opportunity to talk about how the training programme is planned, what experience the teacher has from equivalent programmes and what the teacher imagines the staff can gain from the programme. Another benefit is that the teacher can show a human face. By entering a context (the work placement) where the teacher is a novice, who has to bow to the knowledge and experience of the staff, a situation is created which gives the production staff an opportunity to build up different expectations of spending time together in the teaching room than were formed during childhood schooling. It must be emphasised that the experience from motivating through practical work placements is particularly favourable. If there is a fly in the ointment, it is that the practical work placement can create or reinforce a trend towards a 'merging' between company and teachers/consultants, which may make it more difficult to maintain an analytical distance on the programme and the company (a familiar problem which is described in more detail in methodological investigations on the action research).

While work placements are a well-known tool for motivating staff, a special effort was made in this programme. This is due to the fact that all staff (production staff, white-collar staff, technical staff and management) at MM-BUID had gone on a course – this was a broader target group than could be reached through tried-and-trusted methods. What were called 'support groups' were set up for the individual groups of personnel. Support groups, therefore, existed for production staff, technical staff and white-collar staff. Drafts of course aims and contents were submitted to, and discussed in, the groups. The groups were responsible for broadening knowledge on the course programme among their particular environments. The support groups were not just informed about aims and contents – they helped to create it. Through this effort it was intended first to meet the training needs of the target group as precisely as possible and, second, to foster ownership of the course activity among the groups of personnel.

A last positive aspect of the motivation effort was based on the snowball effect the reputation of a good course programme creates. With the assistance of management and staff representatives, success was achieved in putting together the first team (out of a total of eight) of people whose only opposition to the programme was healthy scepticism. When they were able to return to the company after a one-week course and report that the course programme was of value, motivation clearly rose among the staff.

The motivation effort described above is aimed only at the permanent employees of MM-BUID. The motivation effort relating to the substitutes was less complex – perhaps because the unemployed do not have an opportunity to make the same demands on what activities they are entitled and have a duty to take part in. The motivation was created at three information meetings (40-50 people per meeting) which the public employment service had called and chaired. Also present were representatives of the company (production manager and shop steward for KAD members), the KAD unemployment insurance fund and the training institution. It was apparent from the subsequent comments of the substitutes that it was the good opportunities for ordinary employment beyond the timescale of the *Jobrotation* programme that was the major motivating factor.

4.4.4. Implementation

It would take too long to examine the course programme for the permanent employees in this paper – the aims and content were too specific to the company to be of generally applicable value ([57]). However, the situation is different for the substitutes.

The course programme for substitutes consisted of six consecutive weeks under the heading of *Trends in working life from the 1950s to today*. This approach was chosen to deepen the understanding of the substitutes of the speed at which changes in working life are taking place and the dynamics driving this development.

The teaching was based on three blocks. In the first, the substitutes were concerned with labour-market conditions and organisation of work from a point of view close to the company – for example labour-market conditions at three levels, one regional, one national and one international. In relation to the regional level, a representative from the public employment service came to talk about the current job situation in the County of Roskilde. At the national level, a representative of the KAD spoke about how the labour market is developing and how the KAD is responding to this development. At the international level, a television broadcast on Denmark's position in the international labour market was taken as a starting-point. The emphasis was on questions such as: What qualifications are in demand? What requirements need to be met for labour to remain competitive in Denmark?

The examination of labour-market conditions was based on the dominant flows in relation to organisational development of companies in Denmark (presentations by the trade-union movement on stimulating work in comparison with a more employer-oriented proposal: the learning organisation).

In the second block, the substitutes worked in a project-oriented manner on a topic they chose themselves: conditions as an unemployed person in 1998. The substitutes presented their work

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([57]) Readers with an interest in content and methodological considerations and results in connection with the *Jobrotation* programme are asked to refer to the evaluation report for Medstyr 2, which can be requested from the authors of this paper.

in the form of a play for representatives of MM-BUID, the public employment service and the unemployment insurance fund.

The third block focused on cooperation and communication. The teaching combined presentations on group psychological processes, forms of communication and conflict-solving tools with practical cooperation exercises.

4.5. Changes from first to second *Jobrotation* programmes

Procedurally, the establishment of the second rotation programme took place according to the same guidelines as the first one, and no space will therefore be devoted to it here. The focus here will be on the circumstances which changed, namely the recruitment procedure for substitutes.

Recruitment of substitutes

There had been a substantial drop in unemployment in County of Roskilde since the first *Jobrotation* programme was held. At the same time, it had been emphasised by the labour market authority that very few departures were accepted from the rule that substitutes should be recruited from the group of unemployed people in the reactivation period. These two factors, taken together with generally tighter rules for reactivation, meant that the number of unemployed people who could be recruited as substitutes was significantly lower than at the time of the first programme. AOF Greve had found, in connection with another *Jobrotation* project, that the situation was so critical that it was necessary to cancel the *Jobrotation* programme.

Faced with this situation, the parties behind the programme realised that it was necessary to apply more resources in the recruitment of substitutes. Several actions were undertaken. The public employment service extended the search to other counties. The public employment board called more and smaller information meetings (maximum 25 people). The written information material ahead of the information meetings was drawn up in such a way as to be substantially clearer, in terms of both text and layout. The KAD's unemployment insurance fund sent out the information material together with requests for payment of membership dues to unemployed members. MM-BUID appointed a group consisting of the production manager, the shop steward, a permanent employee who had been on the previous rotation programme and a permanent employee with a Lebanese background to attend the information meetings. The intention was to present as broad a picture of the company to potential substitutes as possible.

The public employment service started then information meetings by talking about the rights and duties of the unemployed, the training institution spoke about the individual elements in the *Jobrotation* programme (previous training, training practice, job training and ordinary employment) and MM-BUID presented the company. The company was presented in broad terms – there was general talk of products (samples of which were brought along), the aims of the company, etc.. But the contribution by the member of staff who had taken part in the previous programme as a substitute aroused particular interest.

After the information meeting, the unemployed had to indicate whether they were interested in taking part in the *Jobrotation* programme as substitutes. Unemployed people who were willing to do so were interviewed by a committee (consisting of production staff) who assessed whether the unemployed person should be called for an employment interview at the company. Despite the extensive and, in the view of the parties involved, successful effort, it proved possible to fill only 17 out of the 18 places for substitutes.

4.6. Final considerations

4.6.1. What qualifications/skills have the staff attained?

The idea underpinning the Medstyr 2 project has been to bring the company and course closer together, so that the players in these two worlds have common responsibility for what takes place in the overall qualification programme. The teachers have been involved in the company, they have been on a work placement and they have brought together the project groups which led to the second course programme. The company's own staff have been teachers on the course programmes with educational support.

In the second course programme, particularly good success has been achieved in establishing teaching processes which promote a smooth transition between work and course and work again. This has provided confirmation of our thesis that the yield from the course programmes is substantially increased when the establishment of such teaching processes is successful.

An effect analysis has been made of this rotation programme, for which the conditions were not optimum because, in view of the delivery deadline for evaluation of the project, it had to be carried out very close to the end of the courses. We can, nevertheless, see that the memory of the course is found to be fully in line with the company-oriented arrangement of form and content and that the smooth transition has been a success.

The question of cooperation has been particularly crucial, and the participants have been, to a great extent, concerned with learning and understanding what creates problems and how these are solved. It is clear that the course has provided opportunities for some collective reflections on the production staff, and to a lesser, but not modest, extent for personal thoughts on the future in the company.

One in four course participants see a positive difference in the direction of better cooperation and better dialogue with other groups in the company. A substantial proportion believe that it has become markedly better. The higher level of information is reflected in the replies to the question on the development process, where no less than 87 % have acquired better knowledge. The desire to keep oneself informed has increased considerably, and it is notable that satisfaction at work is now acknowledged to be related to whether one is involved in product development or not (65 %). The commitment of production staff goes so far that around half could imagine making a further contribution to the quality of production. In other words, there is potential here which the courses have assisted in nurturing.

It is always the case that what takes place in the classroom is the main responsibility of the teachers and it is the management of the company which has the main responsibility for what takes place in the company. That makes demands on both parties in involvement and prioritisation of time. Time will show whether the responsibility of staff themselves for learning will take second place to their own requirements and the requirements of management for increased productivity, resulting in the new skills, better knowledge of the company, better understanding of cooperation problems, greater desire to talk about changes and improvements in production being forgotten or put aside.

4.6.2. Can *Jobrotation* programmes create special training provisions?

There are many aspects to *Jobrotation* projects when examined from the point of view of content and pedagogy/methods. The projects may have one content or another, apply these or those pedagogical principles of learning and extend over a shorter or longer period of time. *Jobrotation* projects, therefore, cannot find a common denominator other than the framework offered by the model. It is therefore appropriate to focus on this framework and ask questions. Do *Jobrotation* projects provide an opportunity for continuing training programmes which cannot be dealt with by other continuing training provisions?

For those who have put these projects into practice, the question is to be answered with a cautious yes. Cautious because it is always possible to claim that the training provision would be or will be implemented without the financial and organisational backing the *Jobrotation* model offers. However, we are convinced that the majority of the many rotation programmes for which we have been main contractors could not have been carried out if the company or companies involved in the cooperation had not received substantial assistance with financing. In this connection it is essential to remember that the groups at which our programmes have been aimed for the most part consisted of unskilled women. The target group is almost by definition threatened by marginalisation from the labour market, and paradoxically very small amounts of training money have been devoted to the group. We would therefore like to put forward three arguments for the *Jobrotation* model as a framework for continuing training programmes.

Jobrotation programmes are particularly well suited as a tool (one of several tools) to implement organisational changes at workplaces. We have found that the changes towards a flat structure in the company and increased autonomy for production staff are well served with a training supplement. It is not enough for a few to receive the relevant continuing training – all staff have to 'learn new tricks' and are confronted with responses to change. The

Jobrotation model provides an opportunity for the provision of continuing training not to be reserved for the few but be offered to all staff.

Tackled correctly and with the necessary backing from employers, *Jobrotation* projects can offer people who have been hit hard by unemployment a route back to the labour market. In the rotation programmes discussed above, the substitutes were involved in the course programme for the permanent employees. During the course programmes, the substitutes were preferred because as new arrivals they were constantly surprised by many of the 'that's how we've always done it' views which characterise every company culture. Being new and inexperienced, which in many contexts is regarded as a regrettable drawback, was clarified as an unappreciated resource. All the substitutes who took part in the rotation programmes were offered permanent employment, and by far the majority are working at the company today.

The model for *Jobrotation* aims at satisfying specific training needs and consequently flexible training solutions. The programmes described above exemplify this in that it is difficult to see the training courses forced into the templates for planned courses of employment training (AMU) or technical schools. In times when companies regard flexibility as a major competitive parameter, it is reasonable that the same demands are made for the performance of the training institutions. The *Jobrotation* model provides an opportunity to meet specific training needs.

Application form for rotation projects in Public Employment Service Roskilde Region

1. DESCRIPTION OF PROJECT

1.1 Applicant: Maersk Medical A/S, Osted	**1.2 Title of project:** ***Jobrotation in Medstyr 2 – part 2*** **Project Future Cooperation**

1.3 Background and aims of project:

The programme described in this application is a follow-up to *Jobrotation in Medstyr 2 – part 1*, which was approved by the council in 1997. The overall aim of the programme is to *provide the production staff at Maersk Medical in Osted (MMO) with the necessary knowledge on the operation of the company so that in the longer term new and appropriate procedures can be created with a higher degree of staff involvement and interdisciplinary cooperation.*

This application replaces two applications which were not put into effect: one was examined and approved by the council in June 1998, while the other was withdrawn at the council meeting on 28 January 1999.

Status of *Jobrotation in Medstyr 2 – part 1*

The results of the first rotation programme have fully met the expectations – both for the substitutes and for the company (cf. evaluation of programme).

The picture for the **substitutes** is that *12 of the 13 substitutes who were employed at the company in connection with the last rotation programme have gained permanent employment.*

Two areas of effort have been identified at the **company**, against the background of the introductory work in the first rotation programme:

1. Need to strengthen the production groups through team-building and conflict-solving
2. Increasing and improving cooperation and understanding across occupational divides
3. Expanding operators' overall understanding of products, processes and frameworks in relation to MMO

The first two action areas are pursued in a context which does not fit in with a rotation programme. The last action area is the basis for this application.

Aims of *Jobrotation in Medstyr 2 – part 2*

The project gives **production staff** an opportunity to expand their knowledge about connections in the company and in that way to acquire an overview which strengthens them in cooperation with other specialist groups – including management. It is a fundamental assumption for the project that there is a close connection between the insight of production staff into the company's processes, products and frameworks and opportunities to carry on working on changes in work organisation towards a flatter organisational structure.

For the **substitutes**, a rotation programme at Maersk Medical in Osted is a good opportunity to get to know a company which in many ways is at the forefront of development towards the *flatter organisational structure, increased staff involvement and cooperation across occupational boundaries,* which is characteristic of the industrial sector. As Maersk Medical in Osted is experiencing substantial growth, there are realistic hopes that all substitutes who fall in with the rhythms and routines of the company will be able to obtain permanent employment at the end of the programme.

1.4 How many people does the rotation project cover:

Employees: 130

Unemployed: 18

1.5 Start and end date of the rotation project:

Start: 06.09.99 **End: 27.02.00**

1.6 Companies covered:

Name: Maersk Medical A/S, Osted **Sector: Medical plastics**

1.7 How is the project management organised:

Cooperating partners: Contacts (responsible):

KAD Roskilde	**Laila Jensen/ Morten Ledskov/Helle Reuber**
AF Roskilde	**Kirsten Høyer Rasmussen/Hanne Tvede**
AOF Greve	**Thomas Braun**
Maersk Medical, Osted	**Sanne Hentze/Anne-Marie Krog/Lis Glennild/Vibeke Brandt**

A project management group has been appointed consisting of the above persons. The project management group will hold meetings as required in the project period, but at least every three months.

2. DESCRIPTION OF PROGRAMME

2.1 Staff covered: **Number: _130___ Total**

Of which staff groups (educational background/job function): Operators

2.2 Substitutes: **Number: _18__ Total**

The substitutes are to be included in **one of 4 shifts** (day/evening/night/weekend). The emphasis is put on the following qualifications/job experience:

a) ethnical background other than Danish
b) able to speak and write Danish
c) M/F aged 45 to 59.

2.3 Project programme:

Employees:

Continuing training:	16 weeks	Start: 04.10.99	End: 27.02.00

The 16 course weeks consist of 8 identical course programmes each lasting 2 weeks.

Substitutes:

Operators

Prior training:	4 weeks (2 c. weeks and 2 pr. weeks)	Start: 06.09.99	End: 03.10.99
Job training:	10 weeks	Start: 04.10.99	End: 19.12.99
Regular employment:	11 weeks (INC. holidays)	Start: 20.12.99	End: 27.02.00

Project planning and coordination:

Selection of replacement labour is done in cooperation between Public Employment Service Roskilde, KAD Roskilde and Maersk Medical in Osted.

2.4 Expectation on employment effect (where appropriate subsequent employment of substitutes):

It is expected that all substitutes who fall in with the company's rhythms and routines will be offered permanent employment at the end of the programme.

3. TRAINING IN THE PROJECT

3.1 Training of staff:

Training element/module:	Number of course weeks:	Training institution:
Understanding of company: Products, processes and frameworks in the company	2 weeks	AOF Greve P&D

3.2 Training of unemployed:

The training programme for the unemployed is divided into four parts:

1. Work placement at MMO with on-the-job training (2 weeks)
2. Course in labour-marked conditions (2 weeks)
3. Course in understanding of company (with permanent employees) (2 weeks)
4. Operator course (AMU) (2 weeks)

Listed below are the topics of the course programmes divided into weeks

Training element/module:	No of course weeks:	Training institution:
Communication and company culture	1 week	AOF Greve P&D
Staff influence on company: Background and conditions	1 week	AOF Greve P&D
Understanding of company: Products, processes and frameworks in company	2 weeks	AOF Greve P&D
Process industry operator training Step I	2 weeks	AMU Centre in Køge

3.3. Purchase of training:

Employees:	Unemployed:
Price per course week/team:	Price per course week/team:
a) DKK 33 500	a) DKK 31 500 (AOF Greve P&D)
	b) DKK 44 025 (AMU Centre in Køge)
A) Cost, total DKK 536 000	B) Cost, total DKK 151 050

3.4. Other information concerning the training part of the rotation project:

The substitutes take part in the course programme for the permanent employees. An effort is made to distribute them equally between the last 6 course programmes for the permanent employees, so that the substitutes have had an opportunity to acquire more diverse knowledge of the company.

4. EVALUATION OF THE PROJECT

4.1 How is the project evaluated:

A standard evaluation is made of the rotation programme. In addition, an extensive external evaluation is made of the whole ATTAK project Medstyr 2 which is sent to the council when it is ready.

Who carries out the evaluation:
AOF Greve Project & Development Department and TI-Arbejdsliv.

4.2 When will an evaluation be available:

RAR's standard evaluation will be available in April 2000.

The ATTAK evaluation will be available in the spring of 2000.

5. APPLICATION FOR SUPPORT FOR PROJECT

Project expenditure/income:		**Total, DKK**	**Of which, applied for from council:**
A.1	Purchase of training for employees (see 3.3)	**536 000**	**486 500°**
A.2	**Public support (miscellaneous):**		
	• Training leave payment	**552 000**	
	• VUS (Adult Education Funding)	**165 600**	
	• Subsidy for training (VUS)	**(49 500*)**	
	• (supplementary) Support to employees (§ 88a)		
A.3	**Total to employees who take part in training**	**- 181 600**	**486 500***
B.1	Purchase of training for unemployed (see 3.3)	**149 720**	**63 000**
B.2	Wage bill for substitutes	**2 153 844**	
	• Job training subsidy and refunds for leave	**722 714**	**325 274**
B.3	**Total to unemployed, who are to be substitutes**	**1 431 130**	**388 247**
C.1	**Support for project planning (see 2.3)**	**See 5.2**	---
C.2	**Support for project coordination (see 2.3)**	---	---
Total	**(A.3 + B.3 + C.1. + C.2.)**	**1 200 030**	**874 774***

5.1. Do the employees receive full pay during participation in continuing training under the project: yes

Wage bill for employees in training, total: DKK 1 481 480

5.2 Supplementary information regarding project finance:

* The VUS subsidy to training is calculated as DKK 49 500. This sum is deducted from the purchasing of training for employees in A.1. and included in the co-financing of the company. However, it must be emphasised that the sum is based on an estimated calculation from which the actual amount may differ.

Share of the company in the total expenditure: DKK 912 250

Project coordination and planning (C.1 and C.2) are financed through ATTAK funds.

Under B1 'Purchasing of training for unemployed', no application is made to the council for course expenses on AMU programmes totalling DKK 88 050. However, if it proves not to be possible to finance this expenditure in the AMU system, contrary to expectation, the council will also receive an application for this part of the course.

6. SIGNATURES

Company representative – management:

Date:___________/________________________________

Sanne Hentze / Production Manager, Maersk Medical A/S, Osted

Staff representative:

Date:___________/________________________________

Anne-Marie Krog Shop Steward for KAD, Maersk Medical A/S, Osted

Trade union organisation:

Date:___________/________________________________

Laila Jensen / KAD Roskilde

Training institution:

Date:___________/________________________________

Lynn Elizabeth Hansen / head of department, AOF Greve P&D department

Date:___________/________________________________

Thomas Braun / training consultant, AOF Greve P&D department

5. *Jobrotation* Efficiency: small and large companies compared

Lizzi Feiler ([58])

Summary

Jobrotation was introduced in Austria in 1996 in the framework of an ADAPT-Project and has been integrated as a regular instrument of active labour market policy. Programmes have since been implemented in diverse industrial sectors and regions, focussing on special target groups of the labour market and on different sizes of companies. The main advantage of small companies consists in the enhancement of personnel development structures and tools inside the company, providing better information and knowledge about training methods and training providers for management and employees. Projects with large companies show high quantitative effects with an improved match between demand and supply on the labour market. An additional factor is the stage of organisational development of a company: job creation potentials are highest in innovative companies and growing industrial sectors. *Jobrotation* can be a highly efficient labour market tool if the programme management unit follows a strategic approach in the selection of companies.

5.1. The experience of *Jobrotation* in Austria

Jobrotation was introduced in Austria in 1996 in the framework of an ADAPT-Project which was concerned with transferring and adapting Danish good practice in active labour market policy and forming an initial transnational network of 12 partners. *Jobrotation* programmes have since been implemented in Austria in different industrial sectors and regions, focussing on different target groups in the labour market. A total of 66 companies have been involved, with 2677 employees in training and 302 formerly unemployed people working as substitutes while the employees took part in training programmes. As many as 80 % of substitutes could be integrated into regular, permanent jobs within the same company.

Jobrotation is not an end in itself but a means to an end. Following the overall goal of preventing and combating unemployment by updating and raising the level of qualification,

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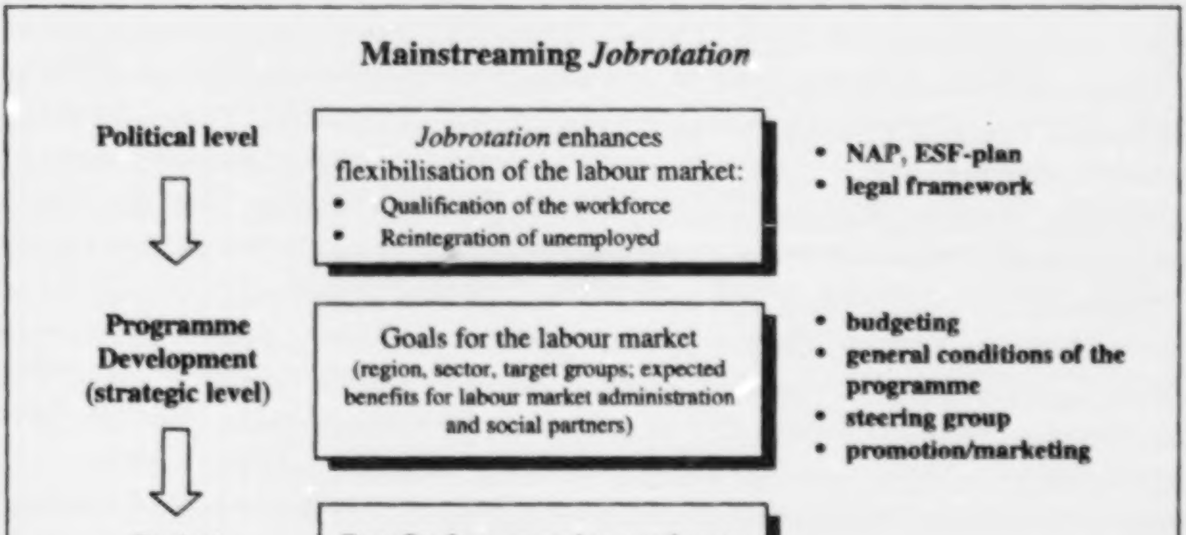
([58]) Management consultant and expert in active labour market policy; with ÖSB-Consultants since 1985. Programme development and implementation of *Jobrotation* in Austria. Assessment of qualification needs and labour demand in the ICT-sector of Austria. Leonardo da Vinci project: 'Dissemination of *Jobrotation* Methods in Pre-Accession Countries". Promoter for the transnational EU-*Jobrotation* network. E-mail: l.feiler@oesb.at the programmes focussed on special industrial sectors, reaching priority target groups for labour market intervention. Examples of this targeted approach are a programme giving priority to female employees in training, a programme aimed at job creation for women in the health and social services sector, and a programme aimed at integration of the long-term unemployed into the labour market.

5.1.1. Programme development, implementation and results

Programme development

Jobrotation has been integrated as a regular instrument of active labour market policy and is financed by the European Social Fund and the Public Employment Service (PES). General guidelines at national level define the basic conditions for implementation at regional level. (Two thirds of qualification costs are subsidised and wage subsidies can also be granted for the long-term unemployed. The company finances one third of the training costs for employees and the wage costs of substitutes.) The regional offices of the PES administer the funds and define *Jobrotation* programmes in accordance with the specific goals for the regional labour market. A programme management unit is commissioned. It coordinates the partners activities and tasks and offers consulting services to the companies. A promotion campaign is started to inform the companies.

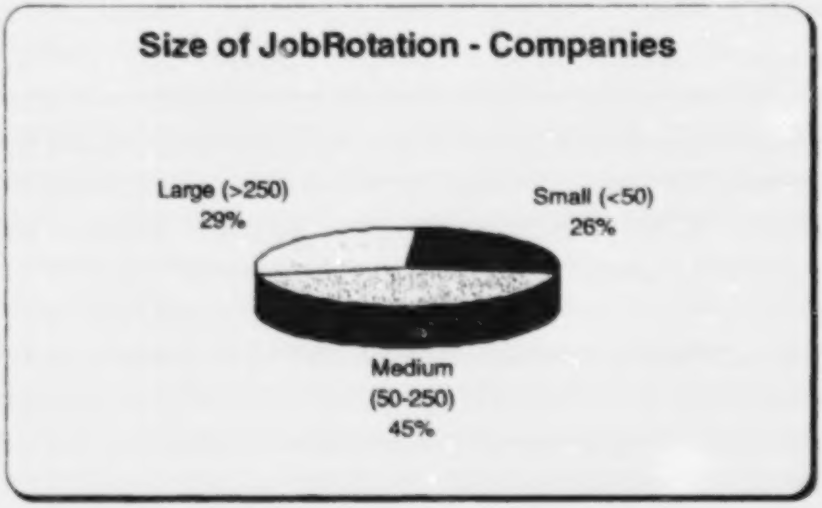

Mainstreaming Jobrotation
Political level
Jobrotation enhances flexibilisation of the labour market:
• Qualification of the workforce
• Reintegration of unemployed
• NAP, ESF-plan
• legal framework
Programme Development (strategic level)
Goals for the labour market (region, sector, target groups; expected benefits for labour market administration and social partners)
• budgeting
• general conditions of the programme
• steering group
• promotion/marketing
Project implementation at company level
Benefits for companies, employees and the unemployed
Assessment of qualification needs and personnel demands
• project-management
• consulting services

Project implementation

Project implementation involves a network of partners coordinated by the programme management unit. The company's part is to develop qualification plans for their employees and to define the need for additional labour (job demand profiles for substitutes). The local office of the PES is responsible for pre-selection and placement of the unemployed. Various training institutions are involved to cover the range of qualification needs. The regional office of the PES subsidises the project on the basis of a project description. The task of the ÖSB as programme management unit is to inform and persuade the companies, to offer consulting services to the companies, to coordinate the partners and to steer the implementation process.

Implementation of *Jobrotation* involved companies of different size: 26 % of the companies had less than 50, 45 % between 50 and 250, and 29 % had more than 250 employees.

Figure 1: Size of Jobrotation – Companies

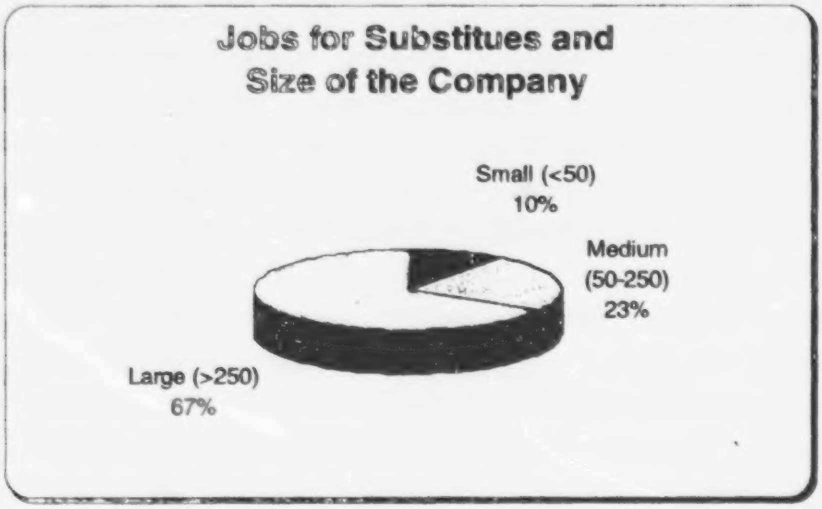


As expected, the largest share (70 %) of all employees who took part in training courses were employees of large companies. But while the participation rate in qualification measures was 9 % in large companies, it was 14 % in medium-sized companies, and 23 % in small companies. That means a higher percentage of the total workforce of a company participated in training in smaller companies.

Small companies employed relatively more substitutes in relation to employees in training. The relationship between employees on training and substitutes was 4 : 1 in small and 7 : 1 in medium and large companies. The integration rate of substitutes showed no significant difference in relation to company size: 80 % of the substitutes were kept on with a permanent job after the substitution period of six months.

In terms of company size, 10 % of all substitutes worked with small companies, 23 % with medium-sized ones and 67 % with large companies.

Figure 2: Jobs for Substitutes and Size of the Company



5.2. The efficiency of *Jobrotation*: a comparison between small and large companies

Any assessment of efficiency requires the prior definition of goals and targets: the goals of active labour market policy on the one hand and the goals of the companies on the other hand. Active labour market policy aims at the prevention and reduction of unemployment. The companies aim at cost-effective qualification which supports the strategic goals of business development. Finding the right people who fulfil the requirements of a specific job is a problem for most companies.

5.2.1. Small or large companies?

Comparing the efficiency in small and large companies, experience leads to the following conclusion.

	Small companies	**Large companies**
Employment policy goals (macro-economic)	○ Higher participation of small companies in training • Secure jobs and job creation	○ Specific groups of employees can be targeted ○ Larger numbers of unemployed can be integrated ○ Closer relation between companies and PES (dead-weight effects must be carefully monitored)
Company goals (micro-economic)	○ Bottleneck problems can be solved with substitutes ○ Tools and methods of strategic personnel development are introduced • Recruitment methods can be improved	○ Recruitment problems can be solved with improved services of PES ○ Substitutes are required if shift workers take part in training measures ○ positive image of the company on the labour market

Assessment of qualification needs: an innovate tool for small companies.

Large companies with human resource managers usually have experience of existing procedures in qualification planning. Small companies frequently lack personnel resources for human resource development which is one of many tasks of the general manager or owner of the company. The introduction and implementation of new tools of strategic personnel planning enhance the sustainable development of human resources and of the company as a whole.

The assessment of qualification needs should be demand oriented with regard to:

(a) strategic goals and human resource demands and of the company;

(b) qualification needs and career plans for the individual employee.

A company based assessment of qualification needs should be introduced and supported by external consultants (programme management unit) and include three main steps.

First it requires the commitment of the top management. The starting point is an interview with the top management of the company. How was the experience with training measures in the past? What are the forthcoming changes in markets and production and technological innovations? Who are the key people to be involved in the assessment process? In which way can employees be included? And finally, is *Jobrotation* the right answer?

Next is the involvement of employees. This second step consists of workshops with the middle management (or, very small companies, with groups of employees or with the whole staff). The top management informs the employees about the strategic goals and objectives of the company. Involvement of employees can be achieved either through a workshop or personal interviews between the employee and his superior, usually covering the following main points:

(a) what qualifications and skills do we need to fulfil the goals of the company?

(b) which are the components of further qualification which can fill the skills gap?

(c) which methods of learning are most effective (assessment of past experiences in training)?

(d) are there bottlenecks in human resources at the workplace / in the department?

tThe results are drawn together in a synthesis report with a draft qualification plan.

Finally there is the project plan with top management. This involves a strategic qualification plan with cost calculations, a work-plan and an indication of the people to be involved (both employees and demand profiles for substitutes).

5.2.2. Companies on the threshold of sustainable growth

The effectiveness of *Jobrotation* or other instruments of company-based labour market interventions is not only connected with the size of the company, but also with the stage of organisational development. The job creation potential is higher in innovative companies and growing industrial sectors. Innovative companies with potential for sustainable growth can mostly be found among medium sized companies.

Three main stages of company development can be distinguished, as indicated in the following table.

Effects of Jobrotation in relation to stages of development

	Small companies	**Large companies**
Innovative, expanding companies	**High indication for *Jobrotation*: High qualitative effects**	High quantitative effects (dead-weight effect to be carefully watched)
Companies on the threshold of growth and innovation	**High indication for *Jobrotation*: Supporting company development and job creation potential**	**High indication for *Jobrotation*: Supporting company development and job creation potential**
Traditional companies, companies in crisis	Other instruments (strategic re-orientation, re-qualification)	Other instruments (mobility centres, labour foundations)

Companies on the threshold of growth and innovation might be new, expanding companies but also companies which managed to overcome a crisis (in the process of re-structuring and strategic re-orientation). They have adapted successfully to changes in the market or are on the way to it. These changes require new skills and more highly qualified employees who can cope with the transition process. Jobs can be secured and job creation potential can be activated.

5.2.3. The efficiency of *Jobrotation* in summary

Jobrotation can be a highly efficient labour market tool if programme management applies a strategic approach for the selection of companies. Macro economic research data about industrial sectors on a regional basis ('skills forecast') is needed. Micro economic data can be gained in interviews with the top management.

Sustainable efficiency in small and medium companies consists of:

(a) enhancing the development of personnel development structures and tools inside the company;

(b) improved information and knowledge about training methods and training providers in the market;

(c) combining strategic company goals with individual, personal career development plans;

(d) improving procedures of recruitment and integration of new staff members.

Positive sustainable effects can be reached both in small and large companies through:

(a) improved methods of personnel demand planning (demand profiles with key qualifications) which give the necessary information for demand-oriented pre-qualification of unemployed;

(b) improved match between demand and supply in the labour market;

(c) closer cooperation between companies and labour market administration offices.

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6. Contribution of Mr Athanasios Papathanasiou, Director of the Technopolis Vocational Training Centre

At the centre of economic reconstruction lies what is coming to be known as 'flexible specialisation'. Whereas the Fordist model of economic development favoured economies of scale, flexible specialisation, by contrast, promotes economies of scope. Flexible industrial production is based on the flexibility of new technologies, the employment of skilled labour and the application of just-in-time production systems. This approach encourages the selective use of labour, rather than supporting mass employment.

New forms of work organisation demand a labour force that is better educated and better trained. Recent developments have made knowledge a basic component of work and a criterion for securing a job. For the workforce of this new century, lifelong learning is essential.

Nevertheless, certain doubts and objections have been voiced concerning the continuous education and training of human resources, mainly:

(a) the fact that skills training for the unemployed is only tenuously linked to the productive process and to employment;

(b) insufficient research into learning needs and training schemes, often resulting in workers' unwillingness to participate in a company training programme, insufficient improvement in their qualifications, and a clash between the time required for training and companies' everyday needs and requirements.

This is why it is necessary to adopt a new approach to lifelong learning and training, an approach that is not limited to education and training systems but also involves both companies and individuals.

The basic objective of this new approach must be the creation of a strong and stable link between enterprises and the economy on the one hand and the content and structures of vocational training and education schemes on the other. This will lead to significant changes, both in the roles of the various players and in their relationships with each other. For vocational training to fall in step with the demands of the age, new forms of collaboration need to be established between all parties involved in the training process, taking into account their separate responsibilities. One of the most important advantages of such collaboration is that decisions relating to the content and methods of vocational training will be taken by those best suited to decide on these matters, that is, by those closest to the workplace. This means, first and foremost, the social partners. Both employers and employees can benefit from appropriate vocational training tailored to the needs of the individual.

This line of thinking leads to the quest for a flexible training model that meets the needs and requirements of modern economic units and their employees and of the unemployed. Such a model must:

(a) offer the possibility of lifelong learning and training to employees without reducing the company's productivity;

(b) offer staff the time and means required for training without disrupting their work relationships or personal lives;

(c) target the elimination of long-term unemployment, by promoting jobs and skills training for the unemployed in real working conditions;

(d) seek to minimise the gap between available skills and competences and the most sought-after qualifications;

(e) prepare the unemployed for smooth integration into the job market, combining the acquisition of new skills and competences with the creation of new jobs, and develop the potential for creating new employment opportunities together with the appropriate training and specialisation.

6.1. The model that combines all these elements is *Jobrotation*.

Jobrotation is a model for continuous education and training which provides for the systematic training of the unemployed to substitute for employees who take training leave. The system is very simple:

(a) employees are selected for a given training programme;

(b) job-seekers are chosen as substitutes for departing trainees and are offered practical and theoretical training so that they can take over these posts;

(c) newly trained workers temporarily replace company employees;

(d) the employees complete their training programmes.

Jobrotation provides an appropriate and useful way of involving companies in lifelong learning, offering positive results to both employees and the unemployed.

6.1.1. For employees

The model is based on the need to forge a solid connection between the planned management of employment and company training policy. The view is gradually becoming commonplace that defining a company's prospects and aspirations and providing for future requirements is an important precondition for implementing an effective vocational training policy.

The use of forecasting techniques may clarify the basic features of training needs for employees.

To implement *Jobrotation* it is necessary to establish the training needs of company staff, taking into account their current skills and sketching out the projected evolution of their qualifications. It thus constitutes a training model allowing for the planned management of human resources.

Jobrotation allows training to take place within the employees' ordinary working hours, with no negative impact on their family and personal life and without adding to the stress of handling day-to-day tasks. They are thus better placed to assimilate the content of training in a shorter time. Providing for substitutes in the company also facilitates, and raises the profile of, mobility for training purposes.

By creating better conditions for training and improving the quality of the programmes, *Jobrotation* increases job stability: it upgrades the skills and qualifications of the workforce, improves their productive capacity and strengthens their bargaining position.

6.1.2. Highly skilled workers

The requirements for implementing the model differ according to the level of the job to which it is applied. In the case of highly skilled workers, planning and implementing specialised training programmes are particularly demanding tasks. These are the employees on whom the adaptability of the company depends; therefore their training programmes must take into account strategic training needs associated with the future business environment.

The gap created in the company corresponds to the level of specialisation of the employee involved. For this reason, the model cannot be applied to highly skilled workers unless there is satisfactory provision for filling the gap and ensuring that the work continues to be performed properly. This means that:

(a) the supplementary qualifications for a worker occupying a highly skilled post must be precisely formulated and incorporated into the content of the training offered, which to a certain extent will have to be tailor-made;

(b) the training programme must be innovative;

(c) the substitution period must be relatively short;

(d) the substitute must be able to perform tasks reasonably competently. If this is not possible then an alternative substitution pattern should be used, whereby the employee is replaced by a colleague who is one degree less highly skilled, who is then in turn replaced by the substitute.

In the case of highly skilled workers, substitution has much higher requirements. Additional conditions must be met for such a substitution to be feasible. For example:

(a) the selection of substitutes must be based more on recruitment criteria and less on the criteria used to select job-hunters for training programmes;

(b) substitutes must have a basic knowledge of the job and some working experience, if in less skilled positions;

(c) the content of the job seeker's training programme must be very highly specialised;

(d) practical on-the-job training prior to substitution is critical. The substitute will have to master the requirements of the job during this period;

(e) the duration of the job seeker's training period must be substantially longer than usual and disproportionate to the training period for the workers for whom he or she is substituting.

6.1.3. For first-time job-seekers

Most unemployed people, especially the young, have considerable difficulty in entering the labour market. Usually, entry into the labour market is preceded by a long period of joblessness and informal employment during which there is a real danger that qualifications may become devalued and the job seeker cut off from the labour market.

Unemployment is a social problem, which poses a serious threat to social cohesion. *Jobrotation* helps deal with unemployment, as it soaks up joblessness by integrating people into a real working environment while counteracting the potential devaluation of their skills and competences.

In addition, *Jobrotation* identifies the qualifications they must acquire in order to be competent substitutes and links the content of the position in which they will acquire work experience with the content of their training programme. This allows for a more successful pairing between personal inclinations and opportunities in the labour market. It also helps them adapt to the continuous reweighting of occupational profiles, given that the dearth of opportunities for some occupations is always balanced by high demand for others.

Although the length of time job seekers will spend in the company is pre-arranged and therefore does not meet their expectations, *Jobrotation* does offer them real working experience. They are thus better prepared for integration into the company's productive process – since they become familiar with the 'company routines' – while it also increases their chances of finding a similar job. The unemployed thus acquire access to the labour market, both as prospective employees in the company where they worked as substitutes and as job-seekers with real work experience and contact with the labour market.

Jobrotation allows the acquisition of job experience in real conditions and with all the responsibilities of a substitute. On-the-job learning is becoming more and more important in training the unemployed. Job seekers are taught on an informal but specific basis, in the immediate environment of their future job activity.

This form of learning differs from apprenticeship. On-the-job learning is a multi-dimensional process through which the job seeker is integrated into the framework of his or her working duties and into the more general labour environment. Substitution is a particularly powerful training process, as it involves the performance of specific acts and requires the trainee to deal with real problems that crop up in specific circumstances. At the same time, the collaboration and coordination required by group work has a multiplier effect on the rhythm of work and skills acquired.

Here we should perhaps point out that the performance of work tasks is seriously affected by the identity and features of the group and requires appropriate social behaviour. The substitute is required to absorb the culture, social models and values of his or her colleagues. Substitutes also learn to function in the framework of an organisation, with its various groups, hierarchies and power relationships. This social experience is particularly enriching for those entering the job market for the first time.

6.2. Coordination

Implementing the model is demanding for all participants. It requires a relatively long period of preparation, coherent action on the part of all those involved and a high level of coordination. These heightened requirements are the counterpart of demand for a type of vocational training that is both effective and socially useful.

The combination of lifelong learning and training of employees and the simultaneous employment of the jobless – a practice consistent with the policy of developing and increasing employability now being promoted throughout Europe – is ensured by implementing the *Jobrotation* model. The programme increases added value and reduces labour costs through the continuous adaptation of the workforce. In addition, this model ensures that the flexibility of the labour force parallels that of the enterprise, achieving the optimum distribution of costs and benefits for all participants.

Jobrotation appears to be a powerful enough tool to defuse potential disadvantages and improve on the advantages that have come to the fore in pilot applications. This conviction is based on the findings that:

(a) from an educational point of view it combines learning and work;

(b) it serves the interests of the employer as well as those of employees and the unemployed;

7. *Jobrotation* from the perspective of enterprises, employees and political decision-makers – expectations and results illustrated by the example of '*Jobrotation* for the Bremen region'

Hubertus Schick (59)

In the past, and even now, *Jobrotation* projects have been greeted with premature praise:

(a) '*Jobrotation* – a successful example of modern labour market policy?';

(b) '*Jobrotation* – an easy answer to problems on the European labour market?';

(c) '*Jobrotation* – a model for Germany?'.

These were the headings under which this type of project was discussed from its introduction into Germany from 1996 onwards. As a result of these high expectations it was placed under pressure from the outset.This also applies to the *Land* of Bremen.

The University of Bremen has been involved in designing and implementing the Bremen pilot project since 1997. I was initially sceptical about this type of project because of the high expectations and the difficulty of combining such varied aims; however, I subsequently took on responsibility for reporting on the '*Jobrotation* for the Bremen region' project. So far we have conducted a study of some 40 enterprises that are interested in cooperating or are already cooperating with the project.

7.1. The structure of the Bremen pilot project

Since *Jobrotation* projects in Germany, as in Europe as a whole, have very different objectives and widely varying structures and funding bases, I shall begin with a brief summary of the Bremen project (60):

(a) the project comes within the framework of the Community Initiative ADAPT and receives funding from the federal institute for employment and the Bremen *Land* ministry, i.e. the Senator for Employment;

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(59) Universität Bremen, Kooperation Universität/Arbeiterkammer (KUA-BIWA) [Cooperation between University and Chamber of Labour]

(60) For a more detailed description, see also Rehling, Heiner; Schick, Hubertus. *Jobrotation für die Region Bremen: Arbeitsmarktpolitik mit der Förderung von KMU verbinden!* In *BWP: Berufsbildung in Wissenschaft und Praxis*, 1999, No 5. pp. 25-30.

(b) the organisation responsible for implementing the project is *alz Bremen-Nord* [Bremen North job centre], a body promoting employment, which for many years has been servicing projects by combining employment goals with skills training

(c) the pool of replacement workers is composed of two consecutive groups, each comprising 15 long-term unemployed persons in the Bremen North/Bremen region. It was formed by creating one-year employment relationships, subject to compulsory social insurance contributions with the implementing company, based on job creation schemes;

(d) informal learning strategies within the implementing company's work process are used to prepare these people for their replacement work;

(e) skills training building blocks for the replacement workers are agreed with the individual enterprises participating and are implemented in cooperation with continuing training bodies;

(f) the project is currently cooperating mainly with SMEs in the fields of metal processing, electrical, plumbing, heating and air conditioning;

(g) continuing training of workers within the enterprises is based on the companies' own independent planning and financing. The project bears none of the costs of this element;

(h) the university identifies the needs of, and possibilities for, cooperation with interested enterprises in individual scientific studies on an ongoing basis. The findings are regularly forwarded to the *Jobrotation* office, together with an assessment of the company's suitability;

(i) the University of Bremen guides and advises the *Jobrotation* office on formative evaluation ('process evaluation').

It is already clear that these parameters of the Bremen pilot project, as described, will not remain as they are. In fact it is precisely because the pilot phase has been so successful that the project structure must, and will, evolve further.

7.2. Expectations of the players involved

7.2.1. Regional enterprises

KUA-BIWA, the cooperation between the University of Bremen and the Chamber of Labour, has been carrying out analyses of skills requirements in a wide range of sectors in the Bremen region for around ten years, and has an excellent overview and in-depth knowledge of the sectors. (61) It was, therefore, possible to obtain in advance a rather precise picture of the framework needs of enterprises and their expectations in relation to a project involving *Jobrotation*.

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(61) In this connection, *cf. inter alia* the comprehensive study by Benedix, U.; Knuth, J.; Wachtveitl, E. *Technologieentwicklung und Qualifikationsfolgen in Metallindustrie und Metallhandwerk: Repräsentativuntersuchung in Bremer und Bremerhavener Betrieben*. Bremen: EQUIB, 1997.

The majority of enterprises in the Bremen region were, and continue to be, aware of the need for technical and organisational innovation to ensure that they are competitive and to safeguard jobs. Company decision-makers recognised the importance of advanced and continuing training in enabling employees to adapt to structural change in industry and the craft sector.

However, the surveys also revealed problems in the following areas:

(a) releasing employees for participation in advanced and continuing training programmes, particularly in enterprises with a small workforce;

(b) translating needs into enterprise-specific advanced and continuing training activities and the relevant planning of continuing training.

This is in line with the usual starting point of most *Jobrotation* projects in Germany. The investigations conducted within individual companies in the context of the *Jobrotation* project confirmed these findings as regards their in-house continuing training practice. However, they were also supplemented by the findings relating to a very basic aspect, namely the enterprises' hiring practices:

(a) some 60 % of the enterprises that expressed a preliminary interest in *Jobrotation* need to recruit more workers;

(b) the smallest craft-oriented enterprises, in particular, are interested in *Jobrotation* for this reason. They are seeking a tool for trying out workers in their future working environment before they take them on, in a kind of familiarisation stage. This would enable them to clarify reciprocal expectations as regards the job and the new worker's performance;

(c) two expectations are clearly particularly important, having been voiced by an overwhelming majority of the enterprises investigated:

    (i) cooperation with *Jobrotation* projects should not involve major additional administrative effort and expenditure for the enterprise and should leave it free to plan the continuing training it needs to handle its operations;

    (ii) ideally, replacement workers should come directly from other types of employment and should not begin work in the company immediately after a lengthy period of unemployment. Accordingly, the pool of replacement workers is expected to be organised in the form of employment relationships.

It is also important to note that, at the start of the project, employers' associations in the Bremen region expressed reservations and scepticism about the project. At first, their representatives regarded as suspect the combination of promotion of the business infrastructure – which is a fundamental objective of projects of this type – with labour market policy. Hence they initially showed a tendency to criticise this project type as being too complicated a way of promoting business development.

As cooperation with individual enterprises developed in positive fashion, these reservations decreased.

7.2.2. Employees

Since in the Bremen project structure enterprises are wholly responsible for continuing training of employees – not only in terms of needs and planning, but also of financing – the views of employees have so far not been prominent. Essentially, they have been represented by works managers, who provided information on employees' future training intentions. It must be remembered that in many of the smallest enterprises surveys of workforce training requirements drew this subject to the enterprise's attention for the first time. The offer from the university, and its research, very often led works managers to recognise and treat continuing training as a field of action within the company for the first time. This means that no results dealing with enterprise employees can be expected until later in the project.

At the outset, however, one crucial aspect was the expectations of the unemployed project participants, who were seeking reintegration into working life as replacement workers. The views of one participant in the Bremen project have already been presented and discussed in the course of this Agora. In what follows, therefore, I shall put forward general viewpoints associated with expectations of the project, some of which had already been formulated in advance of implementation:

In traditional schemes designed to reintegrate the long-term unemployed (job creation schemes), skills training is usually not coordinated with specific company needs. Here, skills training was to be much more precisely matched to needs, on the basis of individual analyses of needs.

Until recently, these traditional schemes tended to include only a minor element of practical experience within enterprises. Insufficient advantage was taken of the fact that well-prepared in-house practical experience demonstrably improved participants' chances of obtaining jobs. Admittedly, there was no legal basis for this in Germany – only when the old employment promotion act (AFG) was replaced by the new social security code (SGB III) did scope for extended periods of in-house practical experience come into being. This is now one of the elements constituting the legal framework for replacement workers in *Jobrotation* projects.

All the members of the Bremen project's pool of replacement workers were long-term unemployed. On average they had been unemployed for around two years before they took the *Jobrotation* 'opportunity', which is how many of the participants themselves described it in a survey. Therefore, their first expectation was that *Jobrotation* would help them to obtain proper employment again in the primary labour market, especially as some of them had made other failed attempts and some had never been offered an opportunity of this kind. Thus, they primarily saw *Jobrotation* as a form of reintegration; i.e. they expected it to have a high level of success, although not necessarily leading to immediate employment. The long-term unemployed participants were fully aware of the value of a period of proper work in-house while acting as replacements, even if they were not subsequently taken on.

In the preliminary selection process, disappointment initially became apparent in relation to the level of payment. Since their existing skills levels were relatively high, and some of them had previous experience (lengthy in some cases) in a Bremen shipyard, many possible participants had expectations that could not be met by the project's job-creation-scheme financing. In the run-up to the first stage, some initial difficulty was experienced in creating the pool in line with the project mandate.

Employee representative bodies support the project. In Bremen, trade-union representatives and the Chamber of Labour quickly adopted a positive attitude to the project concept and its implementation. Supraregional employee representative bodies now also see projects of this type as a positive tool for employee-oriented staff development. (62) Trade unions in Germany were quick to state their expectations as regards the project structure and, in particular, the status of both employees and replacements in the rotation. They were initially sceptical about these issues, but this scepticism has now completely disappeared. Employee representatives in Bremen take part in the 'workshop discussions' in which the regional players involved regularly produce interim reports and draw inferences for future work.

7.2.3. Federal institute for employment/Bremen North employment office

In response to the question of initial expectations, the head of the Bremen North employment office once again emphasised the relatively poor prospects offered by traditional job creation schemes as regards the primary labour market. The most recent research on this issue in Germany has shown that six months after the end of job creation schemes, only 11 % of participants had entered employment in the primary labour market. The local employment office's expectations in relation to these figures have been very clearly expressed.

With the new type of project, in which job creation schemes have played a major part in the structure of the pool of replacements, perceptibly improved access to the primary labour market is anticipated, i.e. a much higher rate of obtaining jobs than the 11 % cited. The employment service representative expressed what is expected of the project by saying 'what we want is success, i.e. an end to unemployment'.

The employment office also took these expectations into account by changing, to some extent, its allocation practice. According to the head of the office, in some cases the people assigned the jobs were not typical clients of job creation schemes, but workers whose skills profile was above average for the long-term unemployed, and who were more highly motivated.

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(62) In this context, cf. also Rehling, Heiner; Schick, Hubertus. *Jobrotation: Baustein für mitarbeiterorientierte Personalentwicklung*. In *Gewerkschaftliche Bildungspolitik*, 2000, No 1/2, pp. 4-6.

This was also supported by a so-called *Trainingsmaßnahme* [training scheme] (§ 48 SGB III) in advance of the scheme. This ensures that the procedure for selecting participants is not merely a simple test, but comprises a four-week skills training programme, itself designed to brush up or impart basic skills, which at the same time assesses participants' suitability over a lengthy period.

All these aspects clearly show that the employment service not only had, and has, particularly high expectations, but also supports these by means of job promotion conditions not usually seen hitherto in job creation schemes. In other words, it is providing relatively good conditions. The employment service also sees the project as being a pilot scheme, involving expectations associated with the future of employment policy, which should also be supported accordingly by means of the provision of 'preferential conditions'. Hence it is not going too far to say that the employment service can consider *Jobrotation* models to date as a kind of testing ground for introducing change in employment policy and employment promotion.

7.2.4. Senator for employment in Bremen

The regional political administration, in the shape of the official Senate representative, the Senator for employment, has long seen its task as lying primarily in active labour market policy, treating skills training and promotion of continuing training as key elements in preventing unemployment. This is closely bound to promotion of a modern business infrastructure, particularly for SMEs.

For this reason, the Senator was, in principle, receptive to the project and its objectives. However, he was sceptical about whether enterprises would be willing to accept the offer and take on an unemployed person as a replacement worker and give him or her responsibilities in the work process.

The Senator pointed out that the Bremen model also made considerable demands on companies. The Bremen project does not provide for enterprises financing of continuing training of their staff through the project, but expects this to be financed exclusively by the enterprises themselves and/or their employees.

In order to forestall anticipated problems, especially in the initial stage, the Senator therefore urged that a pool be created on the basis of a job creation scheme. With a fixed nucleus of replacement workers for a year at a time, this provides a basis for rapid and non-bureaucratic processing of replacements and any subsequent employment. This is all the more important when, as in the Bremen project, replacement is handled in such a way that participants are prepared for work in specific enterprises.

In the second stage of the pilot project, the *Land* administration invested a substantial proportion of the funds available to it in this project. In this way it took account of the large number of management and administrative functions necessitated by the complex target structure. Thus the Bremen project was subjected to considerable pressure as a result of the expectations invested in it. With this input, the results were expected to be well above average.

7.3. An interim report

The expectations described represent both general ideas relating to the project type as a whole and expectations ensuing from the specific structure of the Bremen project's pilot stage, which take on new meaning under different or amended conditions.

These expectations and reservations give rise to the following problems, not only for the Bremen model but also for *Jobrotation* projects in general.

The initially sceptical attitude of employers' associations shows that it may at first be difficult to convince employers of the value of combining business development and labour market policy – the crucial element of this project model. Obviously such an attitude on the part of an association continues to have an effect even if enterprises themselves have long been persuaded of the value of a *Jobrotation* project and are initiating many good cooperation-based relationships.

But, here too, increasing interest has become apparent, not least owing to the positive reception companies gave the project. For example, regional business representative bodies have already decided to organise something jointly with the project, thus acknowledging that the project will become an ongoing component of regional policy.

The problem of remuneration for workers involved is still a long way from being resolved. However, with its job-creation scheme structure, the Bremen model offers relatively favourable conditions: it provides for normal one-year employment relationships, subject to compulsory social insurance contributions for replacement workers. In the current structure, considerable problems may be caused not only by legislation on incentives, but also by workers' expectations of what constitutes appropriate remuneration. When lengthy periods of substitution are planned in countries such as Germany – where this has rarely been the case so far – the payment system must accord with the requirements of normal work in the company and offer an incentive for participation in the *Jobrotation* system.

Meeting enterprises' expectations as regards the introduction of non-bureaucratic, inexpensive replacement procedures will be critical for all types of financial processing. This is particularly important for small companies, where personnel management normally represents additional work for the head of the enterprise at the end of the working day. The extent to which replacement workers come from an employment relationship akin to the free enterprise economy, i.e. straight from practice, will continue to be important in the future, especially for SMEs. This is a difficult demand to meet.

It is clear that, as far as the employment service is concerned, successful reintegration into the labour market is the criterion for success. Admittedly, company training efforts do indirectly combat unemployment, but this is hardly what the service expects of the project. The employment service has reduced the potential of *Jobrotation* to a single aspect, although admittedly a key one. If there is little success in this area, even if company-training measures are highly successful, the employment service will become less interested or even totally lose interest in this project model.

Financing continuing training of company staff by *Jobrotation* is not a component of the Bremen project. However, there is no evidence that enterprises are less interested in the service as a result. As many other *Jobrotation* projects have been provided with funding for continuing training in enterprises, especially in the pilot phase, more detailed comparative research in this area needs to be carried out in the future. The question of whether this funding element continues to exist is likely to be of significance, particularly if *Jobrotation* is to be institutionalised as a standard tool. Nevertheless, none of the enterprise studies carried out in the Bremen region identified expectations of this kind.

Moreover, like many other authorities in Germany and the rest of Europe, the Bremen authorities provided the project with above-average funding. Any consideration given to institutionalising the scheme, therefore, will have to assume that there will be no linear increase in the funds required, i.e. a future expansion of the project objectives cannot assume a similar increase in the budget available.

7.4. Results of implementation and evaluation by the players involved

The results of the project work can be summarised in a few brief details, which will then be enlarged on by references to the labour market players' evaluation of it.

Interim balance sheet for '*Jobrotation* for the Bremen region" (as at 1.3.00)

Replacements:	42
Of whom, terminated prematurely:	5
Average duration:	1-3 months
Continuing training programmes for enterprise employees initiated or facilitated via *Jobrotation*:	24
Permanent appointments achieved:	25
Permanent appointments planned:	3

Explanatory note: the number of replacement workers far exceeds the number of participants in the fixed pool of members subsidised by the job creation scheme, since after only a few months the project took the decision to include other suitable 'candidates" in the replacement process in addition to members of the implementing organisation's pool. The reason for this was the fact that the demand from enterprises soon exceeded the possibilities available on the basis of the pool of replacement workers. Participants in other programmes operated by the organisation were included, as were participants in training programmes run by cooperating continuing training bodies.

The views of the players involved on the results to date can be classified as ranging from very positive to unreservedly positive. The vast majority of the enterprises targeted showed great interest and agreed to cooperate to an extent that had not been anticipated, particularly within the period involved.

In relation to the large overall number of replacement workers, the number of people who terminated their replacement work prematurely can be regarded as extremely small. Here, the critical factor is that project participants were prepared and assigned to a specific replacement job in an individual process and not in a group programme based on a calculation of average requirements. The ex-post assessment by cooperating companies again stressed the importance of preparing replacement workers in employment relationships akin to those characterising the free enterprise economy.

Naturally in some cases replacement periods had to be terminated prematurely because the enterprise's expectations and the replacement worker's expectations or performance did not harmonise; despite careful advance explanation, there was no sustainable basis for cooperation. In the few cases where this occurred, however, the project structure usually meant that another replacement could be found relatively quickly and non-bureaucratically.

In view of the strong figures for successful integration, the question often arises of whether *Jobrotation* creates jobs. This must be answered in the negative, at least as regards directly demonstrable job creation. It is noteworthy, however, that enterprises use *Jobrotation* as a tool in their recruitment practice. In some cases they reactivate jobs that had long been vacant owing to a lack of suitable applicants or to bad experiences in the past. In other cases, an enterprise may have long envisaged creating another job but was only able to do so thanks to *Jobrotation*. To this extent, some appointments are clearly due to the introduction of *Jobrotation*.

The workers involved, i.e. in the first instance the replacement workers, hold overwhelmingly positive views on the project and its results. Here, they are evaluating not only the question of the replacement work itself and the extent to which it accorded with their expectations and skills, but also the phase of preparation and employment with the company implementing the project and the work opportunities offered there.

It must be said that the verdict is significantly more positive in the case of those respondents who obtained permanent employment through their work as replacements; by far the majority of these have seen their expectations fulfilled. The relatively high number of replacement workers who slotted in successfully and were then taken on permanently has correspondingly raised the expectations of other project participants. Here, as in some examples of participants taken on permanently, it was pointed out that some individual replacement periods have thrown up deviations from the existing skills and expectations of the replacement workers. This was a problem in the first stage of the project, when the project had to respond to the demand from enterprises in different sectors with a relatively limited pool of 15 possible replacement workers. The expansion of the pool is certain to ensure that the ratio of cover (by suitable replacement workers) to demand from enterprises will improve.

The employment service, i.e. the local employment office, has no reservations about the success of the programme. Here, the high integration figures of 60 % or more carry particular weight, particularly since they are evaluated against success rates of traditional employment programmes. It can be anticipated that within its overall calculations the employment service will provide the project with the same level of support or even more support in future.

A very important aspect of their deliberations on the matter is the fact that the high level of in-house experience involved in the programmes as a result of participants' work as replacements opens up particular prospects of reintegration. This confirms the decision taken in SGB III to grant employment schemes increased opportunities for in-house experience in the form of *Jobrotation* or on-the-job training.

The competent political authority in the region, the Senator for employment in Bremen, is also wholeheartedly positive about the results. In his words, 'Enterprises have accepted what the project offers amazingly well'. At the same time, he stresses that in the 'promotional' phase, future replacement workers initially expressed reservations about the project – something that was quite unexpected – but this problem was quickly resolved by means of the cooperation between the implementing company and the local employment service.

The Senator also pointed out that, while the structure of the pool proved successful in the pilot year, it must be put on a different basis as the project evolves, since the capacities of a fixed pool of this kind are already insufficient.

7.5. Ways of consolidating the project – new demands on the Bremen model

Ways of expanding and consolidating the project have already been addressed, as follows.

Even in the course of the initial pilot phase, it was decided to extend the project to other branches and sectors of trade and industry in Bremen. As regards industrial/technical jobs, the main sector concerned is wood processing. Commercial/administrative requirements are also to be covered by *Jobrotation*, initially by utilising existing contacts and requirements.

Owing to the particular priorities set by the *Land* authority, it has also been decided to extend the scheme to caring/nursing occupations. Both the authority and the local employment office regard it as a shortcoming that, to date, far too few women have been involved in the Bremen project. Their numbers fall a long way short of the percentage that would represent their proportion of regional unemployment. The reason for this lies in the industries chosen to form the basis of the pilot phase, where almost all the people affected by long-term unemployment are male. Hence the decision to extend the project to service sectors is also a decision to increase the proportion of female participants.

Naturally this also means giving thought to expanding the pool: with the addition of new branches and sectors the current pool will no longer suffice to meet the need for replacement workers. The future structure aims to extend the potential for possible replacement workers to other programmes and hence to include other organisations responsible for continuing training and employment programmes. This means that the Bremen model will face new expectations, which can be formulated as demands on its creators:

(a) to move away from a fixed pool of replacement workers known to the *Jobrotation* office to include hitherto unknown participants;

(b) to move away from making a definite offer of a fixed temporary employment relationship to organising replacement periods with a wide range of situations as regards participants' status;

(c) to move away from the secure world of employment relationships in the project's own workshops to a system in which participants occupy a variety of work situations prior to the transition to replacement work;

(d) to move away from having individual participants available at relatively short notice to meet an enterprise's needs as formulated on an ad hoc basis to permanent provision of cover for identified needs and the possibility of providing appropriate replacements;

(e) to move away from selective cooperation with other organisations to established, continuing cooperation with a regular exchange of information

(f) to move away from *Jobrotation* management geared to work on an individual project to developing a form of 'clearing house' for all kinds of needs and cooperative arrangements associated with *Jobrotation*;

(g) to move away from possible competition among implementing organisations to a cooperative working method for the companies involved;

The sectoral and spatial expansion described gives rise to new questions. What will the structure of this project be in the future in Bremen? The decisions taken mean that it is already making the transition from a project to an interregional tool, since it is at the disposal of many players. One question is what the reference points the future structure of this tool should have in Bremen (spatial or sectoral). This *Land*'s specific situation as a 'city state' will also play a part here.

This will also give rise to new challenges for the management and administration of this tool, going far beyond the previous field of responsibility, which had relatively limited project objectives in spatial and sectoral terms.

In terms of the expectations of the two main target groups – enterprises and their employees on the one hand and unemployed participants on the other – new elements affecting the previous criteria for success will arise.

For enterprises, changes in the specific cooperation involved may affect the previous benefits of rapid, inexpensive replacement.

There will be changes in status for replacement workers who were previously unemployed. Compared with the previous support options, these are unlikely to represent an improvement since, as participants in continuing training programmes, they will not have a normal employment relationship with compulsory social insurance contributions.

Care must be taken in future project structures to ensure that unemployed participants do not develop 'careers' in *Jobrotation*. It is of no help to them if the familiar CVs based on job creation schemes and retraining are now replaced by a new type of CV acquired on the fringes of the labour market.

In both cases it is to be hoped that conditions will be achieved in which motivation for participation continues to constitute a sustainable basis for work within this new type of project.

From the perspective of accompanying university research and in view of the fact that a transition to new tasks, organisational objectives and forms is imminent not only in Bremen but also in many other *Jobrotation* projects in Germany and in Europe as a whole, it is important that *Jobrotation* should continue to be an 'open' tool, different forms of which can be implemented on the basis of common principles. Each organisational form and financing model selected must ensure that individual replacements retain the highest possible degree of flexibility, to be understood as including the following:

(a) the ability to respond quickly to requirements formulated on an ad hoc basis, which is, in particular, critically important for the cooperation arrangements with SMEs that predominate in many projects;

(b) the ability to continue to offer enterprises the rotation option, involving temporary replacement and/or permanent appointment, by non-bureaucratic and relatively inexpensive means;

(c) the ability to exert an increased influence on enterprises' continuing training planning, specifically in cooperating, as a *Jobrotation* organisation, with SMEs, but without dictating terms to them. It is essential to the future of this tool that planning continuing in-company training and meeting enterprises' replacement needs are coordinated among the three players, namely enterprises, continuing training institutions and *Jobrotation* organisations.

These basic requirements constitute a minimum project principle. If these essential requirements are to be fulfilled, there are three critical issues as regards the quality of future work within *Jobrotation* schemes:

(a) how can we identify technological developments and enterprises' associated continuing training needs in specific and project-oriented terms, i.e. in a way geared to using this new tool?

(b) what analytical and certification procedures can we develop to identify the skills of enterprise employees and future replacement workers so that existing skills and experience acquired can be accurately assessed and classified?

(c) what quality criteria can we draw up for *Jobrotation* projects or tools to work with and 'identify themselves' in future?

I believe these questions are of major importance. The research team accompanying the '*Jobrotation* for the Bremen region' project will be working on them in the very near future.

8. A few Danish comments on the concept of *Jobrotation*

Jørgen Mørk

Introduction

It is generally recognised that the practice of *Jobrotation* in Denmark is a success, both in creating jobs and in its positive effect on the training culture within enterprises. Similarly, but less tangibly, the concept has contributed to social cohesion by establishing a sphere of co-existence and reciprocity between the unemployed and employees within the workplace itself. What is less familiar, we feel, is the political logic in Denmark underlying the practice of *Jobrotation*. It is a striking gap, and one that this brief paper attempts to bridge. We shall, then, try to bring out the broad outlines of this logic without going into facts and figures.

8.1. Employment policy

In the first place, *Jobrotation* is an employment policy instrument.

The aim of employment policy is to create new jobs or, more technically, to revitalise the labour market in such a way as to generate a demand for additional labour. It thus respects the priority concern of enterprises: each new job must meet a need expressed by an employer or, of equal legitimacy, by employees wishing to be as effective as possible in their workplace. One excellent example is the need that gave rise to the concept of *Jobrotation*: the demand to make the position of employees more flexible so that they can go on further training without disrupting the enterprise's production.

More specifically, it is claimed that the concept of *Jobrotation* is a response to the demand from employers, who recognise the need to implement effective alternance between training and employment for their workforce. The authorities, therefore, offer replacement workers recruited from among the unemployed who have received elementary training so that they can fill posts that are temporarily vacant. The concept of rotation goes further, however, as it assumes that the unemployed should be integrated into the cycle so that they can gradually acquire the same skills as the core workforce in the enterprise.

At the level of the national economy, the benefits of *Jobrotation* programmes are to be found in the creation of many additional jobs, especially in large public-sector enterprises but also on occasions in the private sector. Even so, we should not under-estimate the effect of getting a jobless person back to work, however temporarily; it is an achievement that will inevitably contribute to an individual's recognition of his own employability. At this level, the genuine innovation of *Jobrotation* is an acceptance of the presence of an unemployed person in the cycle of training and employment. This represents progress that will be defended.

Jobrotation is an instrument that meets demands in the workplace, but it seems that the more the workplace depends on the latest skills, the less attractive replacements are, even if financial compensation is offered. This means that, on the whole, job creation still occurs on the lower rungs of the skills ladder, where in principle there is no major problem in switching between an experienced and inexperienced worker. It goes without saying that employers refuse to engage in *Jobrotation* if it has adverse implications for the stability of its core of well-trained workers, in other words its skilled personnel. As a result, the integration of the more competent unemployed is still a challenge for employment policy.

8.2. Training policy

Jobrotation is also a training policy instrument.

The aim of this policy is to meet the need for skills within enterprises or, more broadly, in the labour market, the latter also taking into account the kinds of training to be provided for jobseekers. But it is not enough to satisfy immediate demand; training policy must also seek to anticipate emerging needs on the near horizon. Here structural changes pose a very specific challenge, as they arise in the production environment well before the skills they entail are recognised and can be integrated into training programmes.

With the economic upturn of recent years and the acceleration of structural changes, it appears that the enterprise of today is once again an ideal training venue, as it used to be in the age of artisan production. A jobseeker can hardly become qualified for a job without having proved his competence in a modern enterprise in adapting to the pace of change. In the same way, although the logic may seem to be inverted, an employee must prove his ability to undergo training while remaining productive, as if he were a craftsman from the last century. For many reasons, this is not possible, but there are partial solutions to be found in the concept of *Jobrotation*, which not only creates a body of qualified replacements but also offers scope for establishing stand-ins for the price of a single employee.

The concept of *Jobrotation* has a fairly marked influence on progress up the hierarchy of skills. By energising the training-employment cycle among employees, it leads to an upward movement towards the top and leaves a vacuum in its wake. These are, of course, the simplest tasks, but this also means that they can more readily be performed by jobless people with sufficient training to act as replacements.

On a general level, training policy is concerned with the skills of the working population, but it is nonetheless crucial to ensure that employees are continuously employable and to promote their mobility in the labour market. It is when they move from one job to another that a vacuum is created – a temporary vacuum, but sometimes one that will create an in-draught. One of the original features of the *Jobrotation* concept is that it takes into account the need for maximum mobility in the group of employees whose skills are increasing.

8.3. Social policy

Jobrotation is also a social policy instrument.

The aim of social policy is to uphold social stability in the context of an ideal defining its fields of action in the light of national aspirations for equality of opportunity, solidarity with the weakest members of society, and assurance of a fair standard of living. From this point of view, unemployment is an unwanted side effect of the market economy society, an effect that calls to mind the period of greatest social destabilisation in history, the second world war. Getting the unemployed back to work is a social policy objective in its own right: a preventive measure that does not necessarily lead to happiness, but to the desired end of stability.

The concept of *Jobrotation* assumes that the authorities should provide financial support, a form of participation that in essence can be justified by its social impact. For instance, getting the unemployed back to work contributes towards a general recognition of the idea that one should do one's bit before having access to the consumer goods and services available in society. Getting the unemployed back to work through *Jobrotation* is an ideal model for obtaining profit from investment in the labour market, as it appears to meet simultaneously the demands of three policies: employment, training and social action.

During the years of crisis, political leaders felt that what the unemployed lacked was training and that they should be offered a tailor-made plan of action to upgrade their skills to the level required by employers. Today we find that, because of the impossibility of finding a job, about one tenth of the active population has dropped out of the labour market by taking early retirement, placing an extra burden on the social policy budget. Since further training was not enough, a model of reintegration was needed to create a true link with workplaces or, more specifically, with their training/employment cycle, the basis for continuing employability. The current economic upturn has meant that the issue can be reformulated.

The practice of *Jobrotation*, it must be recognised, is an extraordinary social achievement, as it assumes solidarity among those involved in the labour market: the employers who allow their enterprises to be used for what might look like an experiment, the employees who will find that they are replaceable, and the unemployed who have to shift between one status and another. Where it has worked at its best, *Jobrotation* has contributed to social cohesion at the micro-economic level, i.e. on a local scale, in the environment of the employed and unemployed and of employers, who have been given a very practical opportunity to express their social commitment.

9. *Jobrotation* as a means of promoting innovation and employment. A model for small and medium-sized enterprises in North Rhine-Westphalia (D)

Reiner Siebert

9.1. The *Jobrotation* model

Jobrotation is a way of making skills training and innovation possible without disrupting or interrupting enterprise operations.

While employees undergo continuing vocational training, job seekers who are suitable or have been appropriately trained or informed in advance stand in for them in the workplace and carry out their duties.

Thus *Jobrotation* is a combination model, combining employment- and labour-market-policy tools with aspects of structural support and vocational training, since:

(a) enterprises become more competitive, in that they adapt to technological and economic developments by increasing the skills, competences and motivation of their employees, and hence become more innovative;

(b) enterprises ensure continuity and maintain productivity because they can employ, at no cost, skilled workers replacing their regular workforce, who have become familiar with the requirements of the job;

(c) employees safeguard their own jobs by acquiring new, innovative competences as needed;

(d) unemployed people improve their prospects of finding work by acquiring up-to-date vocational experience and being able to expand their skills and know-how and put them to the test in the workplace.

9.2. The objective

Jobrotation aims to achieve a significant improvement in the skills level of all employees. It sets out to facilitate continuing training of employees, especially in small and medium-sized enterprises (SMEs). This continuing training is geared to economic and technological development and to enterprise-specific requirements.

However, this is often problematic, since:

(a) in order to hold their own in the market, SMEs in particular need to keep their employees' specialist skills consistently up to date, as they cannot maintain their own R&D and training departments;

(b) SMEs cannot spare their employees even for urgently needed continuing training – they are indispensable in the workplace.

As a consequence:

(a) the necessary adaptation to keep up with the market and development does not take place;

(b) enterprises become less competitive;

(c) jobs are put at risk.

Jobrotation in Nordrhein-Westfalen (NRW), the largest *Land* in the Federal Republic of Germany, with a population of approx. 18 million, aims to prevent this from happening.

9.3. Increasing competitiveness

Specialist know-how and vocational skills are essential factors in ensuring an enterprise's competitiveness. It is the speed of technological developments, and the changes in production processes and company organisational structures that frequently result from these changes, that make it necessary to provide employees continuously with appropriate vocational guidance. In this way an enterprise not only remains innovative and competitive in the long term, but also improves its performance.

This is where *Jobrotation* comes in, providing enterprises with advice and support aimed at developing and implementing forward-looking continuing training strategies. The aim is to develop enterprise-specific programmes for the continuing training of employees, based on demand and on the particular applications needed.

9.4. Active labour market policy

Implementation and improvement of company continuing training activities is a preventive strategy in the field of labour market policy, aimed at safeguarding existing jobs. At the same time, the 'replacement worker' model prevents long-term unemployment from becoming firmly established.

It is true that *Jobrotation* cannot create new jobs straight away, but only in the medium term, once the boost to skills and innovation, and the subsequent improvement in competitiveness stimulate investment and open up new or increased market shares. *Jobrotation* stimulates employment by activating potential jobs that are not currently filled.

Acting as replacement workers offers the unemployed an opportunity to demonstrate, update and extend their vocational skills by means of preparatory skills training and by becoming familiar with, and subsequently integrating into, enterprise work processes. This considerably improves their chances of integration into the primary labour market.

It is highly probable that once an enterprise discovers a need for skilled workers, it will turn to the replacement workers who are already familiar with the work rather than initiate a costly new recruitment procedure. In this respect, *Jobrotation* provides support not only for enterprises' personnel management, but also for the job placement efforts of public employment and welfare services.

Including participants in continuing training measures organised by the federal institute for employment has a synergy effect, inasmuch as the direct link with enterprise requirements allows an easier transition to the primary labour market and improves the quality of training measures.

9.5. *Jobrotation* in North Rhine-Westphalia

The '*Jobrotation* NRW' pilot project was implemented between 1.11.1996 and 31.12.1999 by the *Berufsförderungszentrum Essen e.V.* [vocational promotion service of Essen], in conjunction with three regional partners, on behalf of the NRW Land Ministry of Labour. As a result of the successful trial, the *Land* government is continuing to use this innovative tool as part of its labour market policy, which aims to achieve work-oriented modernisation. *Jobrotation* is gradually to become a regular feature of *Land* labour market policy. It is also due to be introduced at national level; this development is due to the positive results of the pilot projects in North Rhine-Westphalia and other *Länder*.

The performance target set in the pilot project mandate – the project being open to all areas of the economy and sectors of industry – was that 180 employees in SMEs in North Rhine-Westphalia should undergo continuing training and be replaced for a fixed term by 100 replacement workers. By 31.12.1999, this target had been met in terms of quality and significantly exceeded in terms of quantity: pilot *Jobrotation* projects had been initiated in 230 enterprises. A total of 883 employees underwent continuing training and 314 job seekers acted as replacement workers for a fixed term.

Within the project framework, 17 335.5 days of continuing training measures for employees were organised and implemented. In financial terms, this represents a skills training volume of DM 2 582 754.00. Employees working in SMEs in North Rhine-Westphalia who completed this training were entitled to claim subsidies totalling DM 1 424 553.00 to help cover training costs, or DM 1 613.31 on average. This represents a 55.2 % subsidy. With only a few exceptions, their employers met their own 44.8 % share of the costs.

The average cost per participant of a day's skills training was DM 148.99, of which the subsidy covered DM 82.18.

On average, skills training courses in a *Jobrotation* programme lasted just under four weeks (19.6 working days). Enterprise programmes involved an average of 3.8 employees and 1.4 replacement workers.

9.6. Project development

Over the course of the project as a whole, the figures for the numbers of projects launched each quarter show increasing acceptance of *Jobrotation* as a tool, even if one disregards the extreme figures for 1997 and the exceptionally high turnover in the first quarter of 1999. The trend shows clearly that the four regional *Jobrotation* offices in NRW – in Ahaus, Essen, Warendorf and Wuppertal – regularly succeeded in acquiring and implementing between 20 and 30 new *Jobrotation* programmes per quarter. Here, the first two quarters of 1997 must be regarded as the start-up period, during which the acquisition of enterprises, which was slow to take off, was not sufficient to take full advantage of implementation capacity. As the project evolved, this changed in that some 25 *Jobrotation* programmes on average can now be acquired and implemented each quarter; in contrast, personnel input and time required for acquisition and implementation has been reduced.

Over the entire term of the project, an average of 3.8 employees and 1.4 replacement workers per individual project were involved. Despite marked fluctuations, the number of replacement workers remained relatively stable at around 30 per quarter; the numbers of employees involved at first increased steadily and then gradually declined. The third quarter of 1999 constitutes an exception to this – an unusually large number of employees but few replacement workers were involved, and the average ratio of employees to replacement workers increased to 5:1.

Accordingly, the implementation trend for the project shows an increase in the overall figures. However, while more employees per individual project were involved as the project continued, there was no corresponding increase in the number of replacement workers used or requested.

The tendency for the number of employees per project and the overall number of projects to increase was also reflected in the trend in subsidising skills training. With the exception of the last quarter of 1999, when the imminent end of the project and tighter budgetary controls had a negative effect on implementation volume, the steady increase in the numbers of measures and participants meant that the four regional offices could anticipate a need for approximately DM 200 000 per quarter. However, given the gradual reduction in the percentage subsidy to an average of 55 % over the course of the project, there was a greater increase in the total skills training funds taken up per quarter than would be anticipated on the basis of the increasing numbers of employees participating.

A look at the trend in the subsidy per employee shows that the initial (although not continuous) reduction to approximately DM 1000 was not maintained; instead, a renewed increase was recorded. This relates not to the duration of the continuing training but to its content. Consequently, the figure for the average skills training subsidy per employee for the last quarter of 1999 is DM 1545.99, representing a subsidy that was ultimately less than 50 %.

This shows that there were major variations in skills training costs, depending principally on the main content. Although it seems almost impossible to make reliable forecasts of the trend in skills training project costs, on the basis of the results of the pilot project trend we can take an average skills training subsidy of approx. 50 % or DM 1500 per employee as a reference figure for further programme development.

There is a clearer trend in overall implementation costs (regional management and skills training subsidy per project participant, i.e. employees and replacement workers). In the last four quarters of the observation period, implementation costs stabilised at around DM 3200 (if the figures for the last quarter are given a reduced value), with the share of regional management in the costs coming close to the level of skills training funds. It seems likely that these management costs can be brought down to the level of the skills training costs within the project. Cost-effectiveness can be increased if a lump sum per participant is paid instead of fixed monthly amounts.

9.7. Participating enterprises

Given that *Jobrotation* NRW was launched as a pilot project, it can be considered successful in its objective of being open to a very wide range of sectors of the economy. However, the manufacturing and processing sectors, particularly the metal industry, were to the fore while enterprises in the growth sectors of IT (information technology) and EDP (electronic data processing) were under-represented.

A more general categorisation and a breakdown by pilot regions shows, first, that manufacturing and processing enterprises in the fields of metal/electrical engineering made by far the greatest use of *Jobrotation*. Secondly, it becomes apparent that there were marked differences in the impact on individual sectors in the pilot regions, and that pilot projects were concentrated on three or, at most, four fields. No objective reasons for this can be derived from either the numerical data or the qualitative findings. It is likely that the reasons lie both in the relative proximity of the individual sponsors to particular sectors of industry and, equally importantly, in the subjective approach adopted by individual regional managers.

This coincidental (as it were) variation in emphasis within individual pilot regions ultimately suggests that the implementation of *Jobrotation* projects and enterprise acquisition should be given a broad basis by incorporating as many players as possible, in order to increase the variations in, and variety of, enterprises participating.

This also applies to the more statistically significant division into the three categories of industry, craft trades and services, whose individual identifying features are difficult to distinguish. Here, a particularly striking feature is the concentration of the service sector in the Ruhr regional office, while in the other regions, particularly the more rural Münster area, by far the greatest response came from industrial enterprises. The fact that two regional offices were in strongly craft-oriented areas was not reflected in project implementation. Overall, more than half of the projects were implemented in enterprises which, regardless of their size, could be classed as industrial.

If we look at the implementation of *Jobrotation* programmes throughout the project in terms of sectors (with regard to the six sectors participating most in the project), we can detect two noteworthy trends. There is a steady increase in the number of projects implemented in individual sectors (metal and electrical engineering) throughout the term of the project, while others peak on either a seasonal basis (construction) or a temporary basis (printing, health care, materials testing). This indicates that, in certain sectors, access via multipliers (e.g. at association level) offers a rapid or in-depth embarkation on implementation, while others, owing to their order situation, are more likely to be activated on a seasonal basis. Here too, making sure that the structure of sponsoring bodies for *Jobrotation* is as broad-based as possible can provide the best possible fit between what is offered and the needs, in terms of content and timing, of individual enterprises or sectors of the economy.

In terms of workforce size, by far the majority of the enterprises involved in projects in the pilot phase were SMEs in the traditional sense of the term. Almost two-thirds of all the enterprises involved have up to 50 employees, and a quarter employ ten or fewer. A total of ten large companies with over 500 employees had an opportunity to participate in *Jobrotation* programmes by means of interlinked projects. The regional breakdown by company size follows this overall finding very closely.

Fewer than 20 % of all the programmes implemented involved more than three employees from one enterprise; a good 50 % of them involved only one. The focus on micro-projects becomes even clearer when we look at replacement workers employed per programme. One replacement worker was sufficient for almost 80 % of all projects. On average the employee/replacement worker ratio per quarter tended to rise over the course of the project, hence the number of 1:1 programmes decreased as the project progressed. Accordingly, the generally very expensive, and not always successful, recruitment of suitable and motivated job seekers for a period of replacement work is not the primary reason preventing enterprises from participating in *Jobrotation*, provided that at least one person can be found. This was consistently the case, with only a few exceptions. This suggests that for many of the enterprises involved, the financial incentive of subsidised skills training is at least as important a factor as the need for substitute workers. Finally, however, it is possible that the continuing inadequacy of the financial incentive for replacement workers means that the potential need of enterprises for suitable interested parties cannot be met.

9.8. Replacement workers

Younger job seekers are more likely to be willing to sign up for work as a substitute, particularly because of the relatively unattractive conditions for replacement workers. Although 42 % of all replacement workers employed are over 35, this observation is still valid since there is a steady decrease in the number of replacement workers employed and their willingness to participate as ages increase. Roughly one in five of the replacement workers involved was under 25.

Just under 75 % of all replacement workers are men and only one in ten is not a German national. The demand from enterprises for skilled substitutes was largely met in that only 17 % of participants did not have a vocational qualification. Nine per cent had a qualification from an institution of higher education or a vocational college, and 5 % hold a master craftsman's certificate or an engineering qualification. The largest group of replacement workers, 44 %, had been unemployed for less than six months, but the regional offices succeeded in finding replacement work in the project for 35 % of participants who had been unemployed for over a year. The majority of replacement workers (63 %) went into enterprises within the framework of a training programme, which meant that they continued to receive unemployment benefit (50 %) or unemployment assistance (13 %). Only a small number of participants (5 %) received supplementary benefits and were brought into the project by the social welfare office. Over the term of the project there was an increasing number of unemployed persons receiving a maintenance allowance as part of a continuing vocational training programme; but only just under 50 % of them acted as replacement workers as part of on-the-job vocational training (*berufspraktische Weiterbildung* – BPW). Increasing use was made during on-the-job training periods of other measures to recruit replacement workers, particularly when training bodies were directly involved in project implementation.

One third of all replacement workers involved received subsidies, either from the enterprise taking them in (22 %) or in the form of a skills training subsidy (usually from ESF funds).

The period spent in the enterprise by replacement workers was usually a little longer than that spent by employees on continuing training, since it usually included time for familiarisation and handing over. In order to harmonise enterprise interests with replacement workers' interests, the latter should spend at least four weeks and a maximum of 12 weeks in the enterprise. On the one hand, this allows a more efficient period of work as a replacement and provides a great deal of experience; on the other, it does not lead to too long a period of work which is not rewarded by a standard wage. However, fewer than 50 % of all replacement workers fall into this category, and 31 % remained in the enterprise as replacement workers for less than four weeks. One in four was there for more than 12 weeks.

9.9. Employees

The assumption that younger employees are more likely to be considered or enrolled in continuing training as part of *Jobrotation* has not been confirmed; nor are older employees generally less willing to participate in skills training programmes. Admittedly a good two thirds of all participating employees were aged between 25 and 45, and thus in the age range within which occupational socialisation and development are mainly determined, i.e. when enterprise and personal interests and continuing training needs coincide most markedly. Nevertheless, almost one in four of the employees participating in *Jobrotation* was over 45, while only one in ten was under 25. The replacement workers standing in for employees were usually a few years younger.

Female employees were significantly under-represented, at 18 %. This reflects the sectoral structure of participating enterprises, in which occupations dominated by men clearly predominated. However, the higher percentage of women among replacement workers (28 %) suggests that in many of the positions involved, gender is not a decisive criterion.

The proportion of foreign employees was identical with that among replacement workers, at 10 %. This does not enable us to draw any conclusions concerning this feature in terms of the selection of temporary replacements.

By far the largest group of employees involved in *Jobrotation* are skilled workers. The proportion of unskilled and semi-skilled workers is relatively small, at 13 %. The fact that the project is geared to enterprise needs means that the objective of providing vocational training to upgrade the skills of employees who lack a vocational qualification – a key element of vocational training policy – is of secondary importance within the project. Results show that it is rare for this objective to coincide with enterprise interests. Eight per cent of employees have a qualification from an institution of higher education or a vocational college, and 6 % have a master craftsman's certificate or an engineering qualification. The percentages of employees and replacement workers with vocational qualifications are almost identical, which supports the view that the provision of replacement workers in line with enterprise needs was largely successful in the pilot projects.

The vocational qualifications of participating employees also overwhelmingly reflect their positions in the enterprises. The number of skilled workers entrusted with management tasks brought the proportion of management staff involved in *Jobrotation* programmes up to 20 %. This, too, makes it clear that skills training of temporary workers is not primarily in the business interests of those enterprises that use *Jobrotation* for specific skills training programmes. It cannot be assumed that this target group is involved in programmes to any greater extent, outside the opportunities offered by *Jobrotation*.

9.10. Continuing training content

The type of continuing training selected and implemented for employees can be divided into five main categories. Four in ten employees underwent continuing training in the field of EDP, involving production engineering, commercial, organisational and specialised applications. One fifth of these programmes related to production-oriented applications such as CNC and SPS. A second area involved specialised engineering skills training, mainly in the metal and electrical engineering sectors. The main content involved welding, testing and control engineering. A third major category contained programmes on quality management and enterprise organisation. Here, TQM skills training measures should be considered a special case: very few pilot projects were carried out in this field, but they involved large numbers of replacements as enterprises included almost their entire workforce. To this extent, the 22 % figure for TQM programmes is out of proportion in relation to the project. Lastly, commercial (5 %) and service-oriented continuing training programmes (10 %) constituted a relatively small proportion of the measures implemented.

The majority of the programmes for employees were short and very closely geared to enterprises' specific needs. Forty-five per cent of all continuing training programmes lasted up to one week; these include the subject areas of EDP, management and TQM in particular. One third of the programmes, particularly production-oriented EDP training and specialised metal and electrical engineering subject areas, had a relatively short term of one to four weeks. Only 5 % of all employees were involved in longer-term skills training programmes lasting more than 12 weeks.

The continuing training programmes were implemented by a variety of different agencies and suppliers. Enterprises had usually selected or suggested a supplier themselves. A focus on a single agency was seen only in the West Münster region regional office, and this was due to the exceptional regional significance and industrial links of the vocational training institution concerned.

Employees receiving continuing training usually undergo training specific to a particular target group. Thus, the majority of skilled workers train in subject areas relating to their specific skills, while management staff concentrate on organisational aspects. Training in EDP skills takes place in all sectors of the economy, with a particular emphasis on the printing industry, while skills training geared to service and management predominates in the service sector. In enterprises with engineering and EDP offices, the demand is primarily for EDP and specialised metal and electrical engineering content. The large number of specialised engineering programmes in this field is due to the high proportion of materials testing enterprises participating.

There are major differences in the average overall costs of continuing training in the individual subject areas. For example, EDP and TQM training is more expensive, while the costs of courses in EDP geared to production engineering, i.e. primarily CNC and SPS training, were comparatively low.

The distribution of continuing training content by regions shows clear peaks for individual subject areas. It was not possible to cover all the continuing training categories in any region. One special field proved popular in each region, and this kept being offered or requested. However, the high proportion of EDP and TQM training programmes in Warendorf and Wuppertal was to the result of a few enterprise projects with large numbers of participants.

9.11. Job placements

Generally speaking, the employment effects achieved are considered an important sign of whether the *Jobrotation* tool successfully contributes to labour market policy. In contrast to many other *Jobrotation* programmes and projects within and outside Germany, however, the development of the *Jobrotation* NRW pilot project was geared to enterprise needs from the outset. That is, it concentrated on the aspects of *Jobrotation* geared to promoting innovation and business development. Nevertheless, successful placement of replacement workers in jobs must be seen not only as a desirable side effect but also as an important criterion for the successful development of the model as a whole.

Immediately after the end of the replacement period, 48 % of the replacement workers were given an employment contract while 34 % retained their job seeker status. Eighteen per cent of the replacement workers were trainees participating within the framework of continuing vocational training measures. This means that they were not eligible for the labour market on completion of the training period. If the figure for the number of participants eligible for immediate job placement is taken as a basis, the resulting placement rate for the *Jobrotation* measures is 59 %. Eight out of ten replacement workers who obtained a job found one in the same enterprise, i.e. they were able to get to know their job or successfully demonstrate their abilities in the course of the replacement period. In some cases, enterprises declared themselves willing to take on workers even before the replacement period began. In other words, they used *Jobrotation* to support their recruitment process.

There were considerable variations in the placement rate over the course of the pilot phase. In the early stages, some 70 % of replacement workers were able to find jobs. However, as the project continued the figure fell; in the last quarter of 1998 it was 30 %. At the beginning of 1999, the figure for those finding jobs rose again sharply. The project results do not indicate any possible reasons for this trend.

No significant sectoral differences in placement rates can be identified. However, one noteworthy feature is that the lowest placement rate was recorded in enterprises in the EDP sector as a whole. That is to say that the potential of these enterprises for growth via *Jobrotation* schemes did not result in any noticeable effect on employment. A weak but significant correlation is apparent with regard to enterprise size – surprisingly, the large companies participating were the least willing or able to take on replacement workers as employees. In contrast, the rate of job placements in the enterprise taking on the replacement worker was above average in the very smallest enterprises.

The trend in employment effects in relation to personal requirements for replacement workers is as anticipated. It shows that the younger and better trained a replacement worker was, and the shorter his or her period of unemployment, the more likely he or she was to be taken on permanently. Despite this, however, almost half the long-term unemployed replacement workers (unemployed for more than a year) were placed in jobs in the primary labour market.

A lengthy term as a replacement worker proved to be the most favourable precondition for placement in a job in the same enterprise. Particularly short periods of replacement work (under four weeks) are insufficient for replacement workers to get to know the job and to demonstrate their skills in the enterprise's everyday life – to show that they are worth taking on. However, in these cases the placement rate outside the project is relatively high.

9.12. Conclusions

Given the project financing conditions for the pilot phase, the fact that the project was implemented flexibly, and that the measure was gradually adjusted in line with the way the programme evolved, the costs per participant and per measure tended to decrease, while *Jobrotation* as a tool was increasingly accepted by everybody involved.

Jobrotation is used by enterprises of different sizes and in a wide range of sectors. The contacts and access routes of regional players are a critical factor in the acquisition of new enterprises and groups of companies. Therefore the restriction to four regional players and their capacity for implementation reduced the possibility of more extensive diversification of sectors.

The incorporation of new and different sectors into the implementation of measures is partly cyclical and partly seasonal. Continuous participation (in regional terms) is seen in the case of SMEs, especially in the manufacturing and processing sectors, and more particularly in the metal industry.

Sectoral involvement and multipliers at central level make it easier to incorporate new and different sectors and enterprises while increasing the numbers of participants.

Project- and participant-based financing of implementation costs, in association with expansion of the number of players involved in implementation, makes it possible for target groups to spread out rapidly and for the costs per participant to be further reduced.

The starting point for continuous implementation is micro-projects with fewer than five participants over the course of the project. With micro-projects, it is almost impossible for cost-effectiveness to evolve beyond a ratio of 1:1 (skills training costs to implementation costs).

Given the sectoral trend, the concentration on enterprise needs meant that *Jobrotation* measures were mainly used for middle-aged male German skilled workers and for relatively short engineering-oriented training programmes. If the project is extended to other sectors, other target groups are likely to become increasingly involved.

The problems involved in subsidising and recruiting replacement workers had a negative effect on the regional offices' implementation capacity, but not on overall continuous programme development – even in terms of quantity.

The effects on employment were not consistent over the course of the pilot phase. The programme did not essentially make it easier for problem groups, such as the long-term unemployed, young people or unskilled workers, to access the primary labour market.

Jobrotation, serving as a bridge, helps activate potential jobs that have not been advertised, particularly in micro-enterprises. All employees obtain easier access to continuing vocational training measures, particularly skilled workers in small enterprises.

10. Synthesis of the work

André Kirchberger

Unlike the other 'Agoras', which in essence tackled general themes (for example, Agora VII on 'Working time/Training time'), Agora VIII took a specific approach to training and employment, addressing the subject of *Jobrotation* methodology. *Jobrotation* originated in Denmark and – in particular with the European Union's financial support as part of its structural initiative, Adapt – gradually spread to several other Member States. It has now reached the point at which it constitutes a network for the exchange of experience and practice. It has a simple basic philosophy: to ensure that a worker in an enterprise who goes away for training is replaced during that period by an unemployed person trained for the purpose.

There was a great risk that by focusing on a specific approach the debate in Agora VIII might be 'confined' to a single issue, its presentations and discussions merely 'defending and illustrating' the method (see the critique), without tackling in detail the crucial problem of the role of training in the integration and reintegration of unemployed workers.

In fact this was far from the case. Although most presentations were devoted to describing examples of *Jobrotation* in a number of Member States (Austria, Spain, Germany, France, Denmark, Greece, Finland, etc.), the lively discussions were not restricted to methodology or even to a critical analysis of the experiments.

First of all a preliminary comment – illustrated in the introductory talk by **Mr Patrick Guilloux**: the principles underlying *Jobrotation* go back along way. In France, from the late 1930s, several administrative texts and regulations foreshadowed the approach. But it was not until the 1980s, at first in Denmark, that *Jobrotation* methodology attracted the attention of those responsible for employment and training. The fundamental question was how to avert long-term unemployment by arranging for jobless people to replace workers temporarily absent for training, with proper pre-training. It was a simple idea, but there are two other important factors: first of all, the training is also conducted in cooperation with the worker going away (who thus performs the role of mentor), and secondly the possibility of the replacement being hired in the same enterprise.

The figures mentioned by the various speakers were significant: between 1996 and 1999, close to 100 000 unemployed workers took part in *Jobrotation* schemes. The number of enterprises involved over the same period was also impressive: some 1 850, just over 1 000 in the private sector and 800 in the public sector. In the Member States as a whole, equally significant results were achieved: over 3 100 enterprises and 90 000 workers took part, with about 20 000 jobless people finding replacement employment. It should be pointed out here, however, that essentially it has been in Denmark that the approach has been adopted on a wide scale.

This is not the place to go over the figures set out in the various discussion documents or for the ensuing analyses. Rather, we should try to identify the key issues that are still open and call for further thought.

The first point, forcefully made by one participant (**Mr Jean-Claude Quentin**), was that it was no coincidence that this approach should have been developed in Denmark; quite the contrary. A law enacted in 1989 established a 'right to training' for every worker (lasting one year every five years). The employer's and employee's contributions to the unemployment and training allowance are part of a 'package' that is administered not by the central authorities but by decentralised bodies, regional employment committees, on which both local authorities and social partners are brought together. The consensus approach generally taken to industrial relations in Denmark, combined with the concern to implement an 'active labour market policy', has created fertile ground for the development of *Jobrotation*, in the interests of both the employers and their workers (making the firms more competitive and improving workers' skills), as well as benefiting the unemployed, who afterwards find it easier to find another job.

The case histories of a small German firm in the printing industry (a sector being transformed by new technology) and of a Danish enterprise specialising in medical equipment, were presented by Mrs **Monika Kammeier** and Mrs **Ghita Vejlebo** respectively. They gave the meeting an idea of the potential of *Jobrotation*, especially its flexibility, but also indicated the obstacles that might on occasion be encountered in implementing the measure. Although a significant number of 'replacement workers' are ultimately taken on full-time, it has to be acknowledged that it is not always easy to motivate existing workers to adopt the approach, and to take training in the first place, while at the same time helping to train their 'replacement'. The latent fear is that the substitute might take over the post that has (provisionally) been released. This is particularly true when implementing the scheme for the benefit of low-skilled or unskilled workers, who do not view training as a necessity.

As stressed by several other participants (Mrs **Tuija Leminent**, Mr **Hubertus Schick**), the counterpart to the flexibility afforded by *Jobrotation* is the fairly detailed planning of the needs for skills – in other words, the forward management of the company's skills and human resources. It also calls for a positive attitude to the benefits of continuing training within the workplace, something not always found.

What is more, the proliferation of measures adopted by the authorities to combat unemployment and promote integration and reintegration into the labour market, side by side and without any attempt at internal coherence, tends to discourage the development of new experimental approaches. This is the particular case with certain countries where measures to promote employment may not be implemented jointly with measures for the training of the people concerned. The fact that *Jobrotation* necessarily overlaps the two fields, employment and training, may give rise in some places to serious administrative and regulatory problems, especially with regard to the duration of training (and therefore replacement).

Moreover, why would an employer prefer the *Jobrotation* system to other solutions (such as temporary workers) if one of its workers is going on a training course? This question, raised several times by one of the participants (Mr **Juan Maria Menendez Valdez**), may be answered in various ways depending on the level of the job in question, the duration of training (and therefore replacement) as well as the ensuing costs (knowing that, in one way or another, the *Jobrotation* experiments implemented in several European Union countries are granted subsidies that 'reduce' the objective cost to employers). What is more, the employment services concerned do not necessarily have a pool of available (and willing) unemployed people who have the job experience and skills sought for a substitute to the worker going on training. The reply to this question differs in each case, even though the data presented during the Agora by the members of the evolving European *Jobrotation* network show that employers, other things being equal, are not unwilling to embark on this route, if they are approached in a suitable manner.

As many participants pointed out, in the context of *Jobrotation* it is not just a matter of switching 'situations' (the worker going off for training, the unemployed person taking his place). A whole package of training support is vital, from the initial preparation for this movement up to its completion with the return of the worker from training. This support also serves to 'pilot' the experiment (Mr **Louis Spaninks**), to ensure that the 'replacement' worker has a positive attitude in his new working context. This is especially so if, on completion of this replacement, he is not fully integrated in the company in question and has to go back to unemployment or (more usually) he is 'transferred' to a new replacement post in the same or another company.

Does this mean that, at this phase of explanation and discussion in the Agora, all participants expressed their approval of this approach, even their enthusiasm? It would be wrong not to report the doubts expressed by the Swedish participants in particular (**Martin Hedenmo** and **Bo Edlund**) who, from their respective viewpoints (as a unionist and as an entrepreneur), felt it would be hard to implement *Jobrotation* on a wide scale, partly because the system combines two 'tools' (unemployment allowance and job integration/reintegration), and might even lead to a loss of productivity for the enterprise.

These undeniable difficulties can be overcome (Mr **Reiner Siebert**) provided that the *Jobrotation* target group is carefully defined and that a balance is maintained between maintaining the competitiveness of companies and expanding employment. There is also a need for a clearer definition of the 'status' of the replacement to ensure that the training adds to his qualifications. This is especially true of the nature of his employment relationship – for example, is he an 'unemployed person in training', and therefore receiving an allowance on this account, or is he a member of the company's workforce undergoing alternance training or with a fixed-term or other contract of employment? In other words, what is provided to the 'replacement' should not be perceived as cut-price training. Lastly, again according to Mr R. Siebert, with whom many participants agreed, *Jobrotation* cannot really work unless a need for training has previously been identified in the companies concerned.

It was at this point in the discussion that Mr **Jean-Claude Quentin** raised another basic issue, looking beyond *Jobrotation* itself: in the near future, population trends will be such that employers will have a vital need for workers aged over 45. It is very important that steps should be taken as of now to avoid people dropping out of the labour market and the consequent loss of skills. With the same end in mind, it is also necessary to redefine the concept of 'working hours', making a distinction between 'actual production time' and 'training time', especially when the training must be somewhat distanced from the narrow demands of production tasks.

On this specific point, Mrs **Lizzi Feiler** (who has directed and supervised several *Jobrotation* projects in Austria) pointed out that this method, or more specifically its 'training' aspect, should be designed with its end goal in mind. If *Jobrotation* training is directly linked to a specific task, for example operating a new machine, obviously the cost of the training should be borne by the employer. On the other hand, if the training is being provided to promote access to a job, in the interests not only of the employer but also of the worker concerned, the authorities should contribute. Lastly, if the training is general, its cost should naturally be borne by the individual (with or without the support of the authorities).

It was at this point in the discussion that Mr **Jean-Michel Martin** (in common with others) highlighted the dilemma underlying current experience of *Jobrotation*: is this a response to a problem of employment or one of training and qualification? The issues at stake are not necessarily the same, especially when an effort is made to match the supply of training more closely to demand. Furthermore, as already pointed out, *Jobrotation* cannot really develop unless support facilities are set up to monitor the workers along the route (especially if the replacement worker does not find a 'permanent' job in the host company, and moves from one 'replacement job' to another).

This is in fact why Mrs **Kristina Ossvik** felt that *Jobrotation*, like any other alternative approach to training and integration, must start with a detailed analysis of the employer's need for skills and training. It is far harder to do this in small and medium-sized enterprises than in larger concerns that have the internal facilities for the development of human resources.

Apart from these general considerations, however, two 'technical' questions were raised regarding the efficiency of *Jobrotation*. They concerned the size of the enterprise (is *Jobrotation* more effective in SMEs than in large concerns, or vice versa?), and its efficiency in terms of the qualification of the workers concerned.

The participants' reply to the first question was not such as to clearly differentiate between the two: in a way (Mrs **Emmanouela Stefani**), the smaller the firm, the more important it is for the period of training and replacement to be brief. This is particularly true of SMEs with high added value (in the case cited, software design firms), in which continuing training to keep abreast of technological developments is vital, and *Jobrotation* (on condition that it is for short periods and that the replacements are qualified) may be a solution for the small or medium-sized concern. It is harder for SMEs to do without a skilled worker (Mrs **Kiriaki Liodaki**), especially with short-deadline production methods. This is all the more true in that SMEs, as pointed out by Mr **Hubertus Schick**, are more interested in replacements 'from the field' and having professional experience than they are in unemployed people. For large concerns (Mrs **Lizzi Feiler**), it is easier to concentrate on target groups.

Many of the discussions were on the importance of support facilities, especially the role of 'facilitators', who have a vital part to play in motivating employers and employees to set up a *Jobrotation* system (Mr **Jorgen Mark**). In fact it is up to the employees to circumnavigate the bureaucratic 'obstacles', to stimulate a spirit of cohesion within the company and to organise mobility (both inside and outside the workplace). For this, it is necessary for the 'facilitator' to be outside the company.

The point remains that the development of innovative approaches such as *Jobrotation* assumes – indeed presupposes – an adequate institutional and administrative framework. If this does not exist (Mr **Petros Linardos-Rulmond**), even in a favourable setting (the one cited was a refinery), the enterprise might, when confronted with new production and work organisation demands, confine itself to a rapid retraining programme for workers already in the job.

In other words, as pointed out by a number of participants (in particular Mr **Jean-Michel Martin**), *Jobrotation* should be reconsidered in the overall problem of access to training, for the benefit of:

(a) the employees, for whom this continuing training is essential if they are to adapt to work in an evolving context;

(b) the employers, for whom such training is a means of making the company more competitive;

(c) the jobseekers, for whom these 'replacement' posts (admittedly, backed by pre-training and mentoring) is an ideal path towards finding employment.

This does not mean (Mr **Bo Edlund**) that *Jobrotation* is the only possible approach. Several of those present stressed the need to combine the various arrangements that link training and employment. *Jobrotation* is a tool, a method (Mr **Jens Kruhøffer**), whose implementation entails the active involvement – and this is one of the benefits of the existing approach – of all the people concerned with European networking, in that it is strongly supported by European co-financing under Adapt.

What, then, is the future of *Jobrotation*? The experience of North Rhine-Westphalia, as presented by Mr **Reiner Siebert**, clarified the extent of the challenges for participants, in other words not just the potential of this approach but also its difficulties – what could be called the minimum conditions for its success. What is needed is to identify the demands of *Jobrotation*, which will have a significant success rate only if a number of conditions are met. First of all, initial and continuing training must be so designed as to satisfy the needs of workers, employers and the market all at the same time. Its planning and implementation must be flexible, modular and multi-functional, while nonetheless being project-based and directed toward the practical. Lastly, the development of the system of integration into and return to

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the labour market must be directed towards quality, without disregarding the motivation of the people concerned. It must have a strong component of guidance and advice, and it must be an interdisciplinary approach, covering employment and social affairs, education and training and the enterprise and the economy.

But there is another side of the coin in these challenges to *Jobrotation*: their solution is the prerequisite to the success of the approach. It must be clear that *Jobrotation* is only one tool in the toolbox of a job-promoting training policy. A measure of flexibility must be maintained in its implementation, together with a structured exchange of experience and good practice, for example in the form of a European network based on very close partnerships.

It is clear that *Jobrotation* comes up against a number of external obstacles, most of them legal and administrative. In many countries the measures adopted by the authorities to promote employment, training and the economy are often planned and implemented in such a way that they are mutually exclusive – and this conflicts with any schemes based on 'overlapping' (as is the case with *Jobrotation*).

As pointed out by Mr **Jean-Michel M. Martin**, the significance of *Jobrotation* should be made clear. The emphasis should be on the fact that the approach promotes access to training for a number of workers who would otherwise be excluded from it. Moreover, *Jobrotation* brings solidarity mechanisms to bear (especially with regard to the jobseekers) and small and medium-sized enterprises can benefit a good deal, provided that they adopt a flexible approach. It is equally clear that *Jobrotation* cannot be improvised. In implementing the approach, the assumption is that the project envisages involves two individuals at the same time (the worker going on training and his replacement) as well as other partners – for instance, the workplace or the support and monitoring body. This partnership is one of the prerequisites for the success of the device. The role of the 'facilitators' and 'mentors', as already mentioned, is vital. Finally, it is equally clear to a union body that the implementation of *Jobrotation* must be an area of negotiation, so that the approach can be adapted to the specific needs of the enterprise. The unions must also, where appropriate, bring pressure to bear for an amendment of the labour legislation concerned, in that *Jobrotation* is not really suited – as pointed out in particular by Mr **André Kirchberger** – to 'atypical' workers (part-time, temporary, workers on a fixed-term contract, etc.).

In this spirit, *Jobrotation* and its future should be viewed as part of a chain reaction in dealing with unemployment. The job mobility of workers must have functional support, and must therefore include the qualifying reintegration of the unemployed, all the more necessary as population trends are likely to lead to shortages of skilled labour. But this chain reaction must be 'fuelled' (Mr **Jean-Claude Quentin**), by the general spread of practices allowing a worker to access continuing training schemes on a regular basis. This 'right' to training may take various forms. It may be individual for all employees. It may be negotiated and take place within the enterprise for its own benefit (especially in the case of an SME or a group of enterprises) and for the benefit of the workers concerned, with a view to enhancing their potential employability. It is in a context such as this that 'intermediary' arrangements are vital.

Following on the contribution by Mr **Louis Spaninks**, the participants agreed that *Jobrotation* is a trend whose central aim is to improve the skills of workers, and that in this respect it is one component of education and lifelong learning. In combination with other paths (Mr **Didier Gélibert**), such as the adaptation and reduction of working hours, greater impetus for individual training leave and the development of measures to promote workers' job mobility, *Jobrotation* can be (and already is) a positive response to the development of an active employment policy.

11. List of participants

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Edlund Bo	Association of Swedish Engineering Industries Stockholm, Sweden
Feiler Lizzi	ÖSB Unternehmensberatung Gesellschaft mbH Vienna, Austria
Fernández Luis Miguel	Confederación Sindical de Comisiones Obreras Madrid, Spain
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